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ABSTRACT

This report provides results of a study of training in the catering and hospitality industry in Great Britain in 1994-95. An executive summary presents 22 key recommendations for action to stimulate skills development in the industry and outlines key outcomes. Section 1 provides a broad overview of current training activity, based on interviews with 562 employers, survey responses from 1,319 employees, and case studies of 6 employers. It suggests that most employers did not take training seriously and undertook it to meet a perceived or real statutory or inspection requirement. Section 2 examines the industry's response to national training initiatives. These findings are cited: much of the industry was not aware of National and Scottish Vocational Qualifications or Investors in People, and although over one-half of employers were aware of Training Enterprise Councils/Local Enterprise Companies, only 18 percent were aware of their services. Section 3 focuses on the industry's training needs. These findings are cited: the majority of employers felt staff were adequately skilled, and employees most frequently wanted training in skills of management, computing, health and safety, advanced craft, and supervision. Section 4 summarizes the supply of vocational education and training. Findings are college provision of programs was largely determined by funding considerations and student demands, and commercial training providers identified the need to provide more flexible, tailored programs to meet industry needs. Section 5 examines the major influences on training provision and finds generally low employer awareness of training initiatives. A final section highlights conclusions. (YLB)

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Training
who needs it?

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Training
who needs it?

RESEARCH 1995

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Contents

Acknowledgements iv

Preface 1

Executive Summary 3

- Recommendations & Action Plan 4
- Key Outcomes 14
- Conclusions 17

Overview of Current Training Activity 19

- Current Training Activity 19
- Benefits of Training 21
- Planning Training 22
- Training Spend 23
- Recruitment Requirements 24
- Proportion of Staff Trained 25
- Types of Training 27
- Sources of Training 29
- Training Methods 30
- Measuring Effectiveness 31
- Constraints on Training 31
- Employee Attitudes to Training 33
- Summary 35

Industry response to National Training Initiatives 37

- NVQs/SVQs 37
- Investors in People 41
- Involvement in Government Training Schemes 42
- Summary 42

Training Needs 43

- Evaluation of Training Needs 43
- Skill Needs Identified 44
- Types of Training Needed 46
- Summary 47

Supply of Education and Training 49

- College Provision 49
- Training Providers 55
- Summary 57

Influences on Training Provision 59

- Government Policy 59
- Employer Awareness of Government Initiatives 60
- Training Providers' Views, a Government Initiative 61
- Views of TECs/LECs 62
- Awareness and Understanding of HCTC Roles 62
- Summary 64

Conclusions 65

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Preface

This report represents the culmination of a years study examining training in the hospitality industry[1] in Great Britain in 1994/95. Based on five separate surveys exploring all aspects of the supply and demand of training, it represents the most comprehensive examination of training in the industry ever undertaken.

This report is aimed at all those who have an influence over industry training policy and activity or the provision and take-up of training either at a macro or micro level. It is intended that this report will begin a process of change designed to: ***improve the provision of appropriate training which is accessible to the industry and encourage employers and employees to regard training as an essential investment in their future.***

This report examines:

- current industry training activity;
- current industry training provision;
- industry training needs;
- the influences on supply and demand for training;
- shortcomings of the existing system;
- proposals for change.

It is necessarily critical of some practices, but is not intended to lay blame at the feet of any individuals or groups. It is hoped that the report will generate **constructive** debate and that any deficiencies or omissions in the current report will be brought to the attention of the authors who will then be able to take account of these views in the ongoing process of implementing its recommendations.

1. Throughout this report the hospitality industry includes hotels, restaurants, pubs, clubs, cafes, guest houses, contract catering, public sector, industrial, hospital, education and leisure catering.

Executive summary

Introduction

The hospitality industry is one of the largest employers in the UK - representing nearly 10% of the workforce. It offers a tremendous range of career opportunities and is forecast to continue to grow until beyond 2004. It is an industry that demands high levels of skills, professionalism and customer care. Yet it remains one of the most underqualified industries and displays one of the lowest levels of training activity in the UK economy. Indeed, in recent studies, the industry's skill levels and investment in training was found to be way behind those of key competitor nations.

It is, however, well recognised that in order to continue to grow and for businesses to compete effectively, there needs to be continual effort invested in increasing industry standards. One important way of contributing to this process is by raising the skill levels of the workforce through investment in well planned, well delivered and properly evaluated training programmes.

The picture is not all gloomy, a number of notable organisations within the industry have developed well established high quality programmes of training leading to vocational qualifications. These are the Champions this industry should be proud of. They are evidence that investing in training pays dividends. The fact remains, however, that many employers have not taken responsibility for training their staff properly.

Recommendations & Action Plan

This Executive Summary presents the key recommendations and outcomes from what is probably the most important investigation into training in the industry ever carried out. Its results show clearly that all is not well in the hospitality industry. It tells a story of under-investment in the skills of this industry's workforce. It shows that, with some notable exceptions, industry itself does not see a responsibility to invest in the training and development of its staff. It shows that the Industry Training Organisation (ITO) has failed to get the message across that training can make a difference to competitiveness and profitability. It shows, too that the Training and Enterprise Councils in Scotland and Wales, and Local Enterprise Companies, in Scotland, have similarly failed to inspire business locally with the skills message.

There is no one, magic solution that will suddenly transform the industry's attitude to training and development. Instead, all the partners - Government, TECs, LECs, the ITO, trade and professional bodies, colleges, training providers and others - have to look at the effectiveness of their current work to ensure that, in future, they maximise the chance of increasing people's skills to the profit of the industry as a whole.

In many cases, this means simply building on existing examples of best practice. But, there are also new ideas to explore and there is a need to create new partnerships so that effort which is fragmented today will be concerted tomorrow.

This section sets out a number of recommendations for further action to stimulate skills development in the hospitality industry. Over-arching all of them are some key issues, notably the need to increase awareness of the benefits of training - awareness is especially weak among smaller employers - and the need to promote training for ***all*** staff.

At present, training is concentrated largely on new entrants, and on those expected to hold full-time, permanent jobs in particular. There is a need to promote greater awareness of the benefits of training ***all*** staff - full or part-time; permanent or casual; management or supervisory; craft or operative; male or female; people with special needs; and ethnic minorities - throughout their working lives.

Training: an Industry Responsibility, for better business success

The hospitality industry does not take training seriously. Yet, as this study shows, the benefits of doing so are clear. Key bodies in a position to influence training provision and encourage wider participation (including the ITO, industry, trade and professional bodies, TECs/LECs) have failed to do so comprehensively across the industry. This must be urgently addressed.

Recommendation 1

- *All employers in the industry must recognise a responsibility to train **all** their staff in order to achieve better business success.*

Recommendation 2

- *Key organisations in a position to influence including the ITO, TECs/LECs, trade and professional bodies and employer groups must take a radical and high profile approach to marketing high quality training effectively.*

Training: an investment, not a cost

Employers frequently see training as a cost, not as an investment. During a recession, therefore, the training budget is often the first to be cut back. By the same token, many smaller employers reserve no money at all to pay for training, yet these same employers would gladly spend money on equipment or decor. They do not make the connection between business success, and investment in its most vital asset - its staff. TECs, LECs and the ITO all promote training on the basis that by investing in people, employers will reap direct rewards from improved productivity and perhaps a better awareness of the needs of the customer. Programmes such as Investors in People have helped to get this message across, but there is a continuing lack of hard evidence to back this up. Employers need facts, not opinions.

Recommendation 3

- *proper cost/benefit analyses should be carried out to demonstrate the value of different types of training in various types of organisation: results should be disseminated to all organisations involved in promoting training and used to sell the real benefits of training.*

Recommendation 4

- *case studies should be carried out so that lessons learnt by one employer can be passed on to others - it is easier to relate to similar real life examples than to an abstract message.*

Recommendation 5

- *organisations involved in promoting training should identify "industry champions" - people from within the industry who have a success story to tell and who are prepared to tell it to an audience of their peers.*

The customer must come first

Too often, training is not geared to the needs of the customer. Colleges and other training providers must be more aware of the changing skill needs of the industry and make every effort to adapt training accordingly. Attention needs to be given not only to the actual content of training courses and materials but also to the way in which they are delivered: if small employers cannot spare staff for three days' off-job training, providers should be ready to split the course into (say) six half-day sessions. And language is important: providers must avoid jargon in favour of the kind of language used daily in the work place.

Recommendation 6

- *Providers must take notice of the key training needs identified in this study (to cover skill shortages, customer care, basic craft skills, health & safety, supervisory skills, the training process itself - especially evaluation etc.,) and tailor their provision accordingly bearing in mind the need to be flexible and deliver high quality services.*

Recommendation 7

- *Providers need to develop more flexible training programmes based on the needs of industry including programmes delivered through short, sharp sessions run at times of the day which mesh with the industry's needs.*

Recommendation 8

- *Support materials and flexible learning packages should be developed for wider use in the industry - particularly where they can be tailored to individual need. New technology makes this increasingly easy to achieve.*

Employers don't want hassle

Employers and line managers are busy people. Assuming they are persuaded to view training as a worthwhile investment, they need help to overcome the obstacles to implementing a training plan. They also need to know where to go to get help, and easy access to information on types and sources of training.

Recommendation 9

- *Basic guidance materials need to be made available, illustrating straightforward training techniques, showing how to develop in-house training plans and explaining such ideas as "buddy systems". But there should not be too much reliance on the written word: messages need to be easy to access and easy to understand. Word of mouth is often preferable to a pamphlet, no matter how well designed.*

Recommendation 10

- *Consideration should be given to establishing and promoting a single information centre for any query on training for the hospitality industry. The information centre would offer introductory information, establish the caller's needs and arrange one or more follow-up calls from appropriate local agencies. Advertised regularly in the trade press, the information centre could soon be established as the normal route to support for industry training.*

Recommendation 11

- *Organisations involved in promoting training should work together to produce a database of information about types and sources of training support which can be accessed not only via the information centre proposed in recommendation 10, but through all types of support agency - TECs, LECs, the ITO, colleges, trade associations and so on. It might even be made openly available through the Internet for interrogation by any caller.*

Public funding is vital - but present systems can cause concern

The industry relies heavily on public funding to support the training of many new entrants, especially 16 to 18 year olds and to a lesser extent, adults entering the industry after a long period of unemployment. There is no evidence to suggest that if this funding were withdrawn or substantially reduced, employers would spontaneously make good the shortfall.

Unfortunately, our research highlights widespread concerns that changes in funding mechanisms are having an adverse effect on the availability and quality of training. Increasingly, funding is weighted to reward providers whose trainees achieve predetermined outcomes (e.g., a level 2 NVQ) within a set timescale. This offers the temptation to deliver NVQs to trainees who may well have received training, but who have yet to demonstrate that they are fully competent. If this happens, it will undermine employer confidence in NVQs and publicly-funded training schemes.

In the case of college-based training, there is a further need to ensure that the formula devised by the Further Education Funding Council as the basis for allocating resources for training in different occupational fields recognises that the cost of training in the field of food preparation and cooking, which is labour- and capital-intensive, is high when compared with training in other skill areas. The formula does not fully recognise the extent to which colleges need to invest in their Realistic Work Environments for example. As a result, colleges are being driven by the funding mechanism and much less so by the needs of the industry.

Recommendation 12

- *Government departments, TECs and LECs need to be alerted to the risks to training providers' viability and the quality of both training and NVQs/SVQs arising from current trends in mechanisms for funding youth and adult training.*

Recommendation 13

- *Dialogue with the FEFC needs to be on-going so that future provision of college-based training will take full account of industry needs and will not be adversely affected by current funding mechanisms.*

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Recommendations & Action Plan cont...

Evaluate... Evaluate... Evaluate!

One of this project's findings is that few employers systematically or objectively evaluate training that has been provided to staff. This means that they cannot be sure of the quality of the training delivered, nor certain that the training was effective; moreover, they do not have the information to make adjustments which will improve the effectiveness of training in the future.

Recommendation 14

- *A simple guide should be produced explaining **how** to evaluate the effectiveness of training.*

Recommendation 15

- *Organisations involved in promoting training should produce a code of good practice for training providers, outlining ways in which evaluation can be built into any type of training provision as a normal part of their service to employers.*

Recommendation 16

- *Employers **must** demand high quality training services and complain if they do not get them.*

Recruiting people with the right skills or aptitudes

When employers recruit new staff, they look for people with skills which can be used immediately and/or with the aptitude to learn new skills. However, this project suggests that many employers don't do this very well. This suggests that they need guidance on recruitment methods, but before this can be produced further evidence needs to be gathered on the techniques which are currently in widespread use in the industry.

Recommendation 17

- *Further research should be carried out on the practices used in the industry to recruit staff, identifying in particular how employers find out about the skills and attributes of applicants at the recruitment stage and how this information is used during the new recruit's induction training.*

Spreading the word - sharing the load

TECs, LECs and ITOs share responsibility for promoting the positive message of training across industry, together with a multiplicity of other organisations and training providers. However, many employers could themselves be more actively involved: perhaps they need to be shown how they can help. For example, larger employers with an established approach to training might be in a position to cascade their experience to smaller employers. Groups of employers could work together in consortium arrangements to share the costs and administrative effort involved in training and assessment; trainees could gain wider experience by working with two or more members of the consortium during their training period.

Recommendation 18

- *TECs, LECs, the ITO and others involved in promoting training should examine ways of helping to cascade examples of best practice and the formation of training consortia.*

Knowing Local Needs

Our research suggests that the services offered by TECs and LECs are not widely known or used by employers in our industry. No doubt TEC and LEC officers will continue their marketing efforts to raise awareness and to increase their effectiveness. However, TECs and LECs do not appear to appreciate fully the scale of the hospitality industry, its skills needs or its potential for growth. In part, this could be because ITO manpower research has generally reviewed the national picture: there is a lack of localised labour market information specific to the hospitality industry. If this gap were filled, TECs and LECs might be better able to gear their services to the needs of our industry, based on local data.

Recommendation 19

- *HCTC should work with TECs, LECs and local offices of the Department for Education and Employment to conduct local labour market research which will identify the skill needs of the hospitality industry at TEC/LEC level. TECs and LECs should then use this data to tailor services to the specific needs of the industry locally.*

Two cheers for NVQs and SVQs

Awareness and uptake of NVQs and SVQs is still comparatively low in the hospitality industry. They are still perceived as bureaucratic and as failing to meet the exact needs of the employer. Some NVQs/SVQs suffer particularly low uptake, especially in occupations where there is no established tradition of training leading to a recognised qualification.

On the other hand, experience with NVQs and SVQs has resulted in some of the initial teething problems being overcome and there is a greater degree of flexibility now available so that assessment can be geared more closely to the needs of the individual employer. Some excellent success stories are emerging.

Recommendation 20

- *In continuing efforts to raise awareness and understand of the benefits of NVQs/SVQs, particular attention should be given to providing exemplar models of best practice and promoting industry champions; flexible methods of implementation should also be highlighted. The lead body, Awarding Bodies, Trade Associations, Professional Bodies and employer groups should all play a leading role.*

Recommendation 21

- *NVQs/SVQs in housekeeping, reception and portering need to be more widely promoted to employers and employees alike.*

A long-term strategy

This report has identified a number of important weaknesses in the hospitality industry's approach to training and has made recommendations for some practical ways of improving the position. However, it does not pretend to be a long-term strategy for achieving a quantum leap in the skills base of our industry. For this, further work will be needed, bringing together all the key partners. Discussion needs to be wide-ranging and provocative, covering not only the role of each industry partner but also the role of the Government. This would include a new review of incentives to train such as tax relief and - recognising the possibility of a future change of government - the implications of further, interventionist measures such as training levies which may be considered in the years to come.

Recommendation 22

- *A working party should be set up involving all key players involved in training and development in the hospitality industry to review the supply of training in (and to) the industry with a view to agreeing a long-term development strategy.*

Key Outcomes

- Contract Caterers and in-house caterers, were most likely to provide training for all their staff.

- The vast majority of employers providing training (84%) said they had identified tangible business benefits from training, including increased quality and profits (40%), improved staff commitment (34%) and increased customer satisfaction (32%).

- Formal training plans and budgets were most prevalent in larger organisations and in establishments in the catering services sector. It was apparent that they would only be effective if combined with other good practice in training provision, best identified by the Investors in People (IiP) initiative.

- Most employers who provided training, also paid for it.

- Although 62% of employers providing training used external trainers, these were most commonly environmental health officers (EHOs - reflecting the high levels of food hygiene training) and equipment suppliers. In practice, however, training providers were only used by a minority of employers, with only 27% of all industry employers using EHOs and 23% using training companies.

- In-house on-the-job training was widely used in the industry. It was apparent, however, that in many cases staff received little training and were all too frequently left to learn the job as they went along with no real training development or guidance to assist them.

- Off-the-job training involved considerable use of interactive learning styles, reflecting the practical and communicative nature of the work, but few employers took advantage or were aware of the external provision available.

- Evaluation of the effectiveness of training, when undertaken, was most often informal. Proper evaluation was recognised as being extremely important and, to those who carried it out effectively, an essential part of maximising benefits from training for the business.

- There is still a lack of awareness of National and Scottish Vocational Qualifications (NVQs/SVQs) in much of the industry outside Youth Training (YT) and Training for Work (TfW) schemes. There is a continuing need to highlight the benefits of NVQs/SVQs to ***all*** businesses. The lead body, through its Implementation Action Plans, have identified a number of factors responsible for the low take up of NVQ/SVQs in catering and hospitality. Namely:

- the high number of small businesses in the industry who find it difficult to set up the infrastructure required;
- the long period of time necessary to get ready for NVQ/SVQ implementation;
- the assessment infrastructure required seeming an additional burden to an already stressful workload;
- a lack of perceived tangible business benefits flowing from implementation.

The Plans also put forward action points to address them. However, more needs to be done. There needs to be much more commitment and support from key players in industry.

- Awareness of Investors in People (IiP) amongst industry employers was very low (26%), and take-up even lower, less than 3%.

- Although over a half of employers were aware of Training & Enterprise Councils/Local Enterprise Companies (TECs/LECs), only 18% were aware of the services they provide. A number of employers were involved in placing YT and TfW trainees, but there appeared to be a lack of understanding of the assistance available from TECs/LECs to help implement IiP and NVQs/SVQs.

Training Needs

- Almost half of employers who had recruited staff in the previous year had experienced recruitment difficulties, which they indicated were primarily linked to skill shortages. As expected, it was those who insisted on recruiting staff with necessary skills and experience (larger employers and those in catering services and contract catering sectors) who most frequently reported recruitment difficulties. Skill shortages were most frequently reported for catering assistants, chefs and cooks and bar staff.

- Amongst existing staff the majority of employers felt staff were adequately skilled although larger employers, hotels, hospitals and contract caterers reported lower levels of satisfaction. The main skills thought to be lacking were customer care, basic cookery, health and safety, supervisory and waiting skills. Those employers who had not provided training in the past year most wanted staff to be trained in customer care and food and drink service.

- Employees most frequently wanted training in the skills of management, computing, health and safety, advanced craft and supervision.

Key Outcomes cont...

- Generally only informal measures of the effectiveness of training were recorded and there was a lack of appreciation of the value of such exercises or indeed a knowledge of how to evaluate training effectively.

Supply

- College provision of catering and hospitality programmes was largely being determined by funding considerations and demand from students, rather than industry needs.

- Higher education courses were generally popular with more applications received than places available, while NVQ/SVQ courses in further education were generally under-subscribed, particularly at levels three and four. Colleges reported that the main reasons for this were competition from training providers, other colleges and schools, lack of interest in the industry and lack of financial assistance to students.

- Colleges were largely geared towards the provision of food preparation and cooking and food and drink service programmes, with little provision in accommodation service areas, such as housekeeping, reception and portering. Training providers were also most frequently providing Youth Training (YT) and Training for Work (TfW) trainees in food preparation and cooking.

- Youth Training (YT) and Training for Work (TfW) schemes were popular with the industry, but the funding arrangements imposed by the TECs/LECs were creating enormous cash-flow difficulties for training providers. Arrangements for payment upon the achievement of 'positive outcomes' (jobs or qualifications) within limited timescales were endangering the purpose of the scheme and threatening the quality of training services provided.

- Providers wanted to see greater promotion of NVQs/SVQs and IiP by all industry bodies to stimulate industry implementation.

- Commercial training providers identified the need to provide more flexible, tailored programmes to meet industry needs. They identified growing demand for courses, but increased competition for business.

- Training providers had failed to supply programmes and training related services which properly met the needs of industry.

Key Outcomes cont...

- More flexible training programmes and support materials were required - particularly targeted at small businesses.

Influences

- Employer awareness of training initiatives was generally low with lowest levels of awareness amongst small industry employers. There has been a general failing on the part of all industry bodies, TECs/LECs and government to get messages on training across to at least the majority of small employers.

- Training providers involved in YT and TfW provision were losing confidence in the TECs/LECs and government policies influencing administration of the schemes. Funding issues were the principle cause of concern.

- Awareness of the roles of the HCTC was generally quite low, particularly amongst smaller employers, with few aware of the activities of the HCTC in respect of all its roles.

Conclusions

On the face of it, the results of this report are encouraging in that 57% of employers had been involved in training in the last twelve months. The picture is most encouraging in the catering services sectors and the larger organisations. It is encouraging also that 84% of those involved with the delivery of training saw tangible benefits as a result. These included, improved quality, increased profit levels, employees having greater pride in their work and greater customer satisfaction. Employees too, were enthusiastic about the benefits of training, it enabled them to do their job better - especially where they were given the opportunity to achieve qualifications.

However, as this report shows, more detailed analysis of the data presents a less than rosy picture. Employers, in the main, do not accept the responsibility to train their staff. Nor do they see a relationship between investment in their most vital asset and successful business performance. Even though this report provides such evidence from those employers that do invest in their staff. Effective training in the industry suffers from a lack of planning, monitoring and evaluation and is falling behind its major competitors as a result. Clearly there is no easy solution which will put things right — one of the key difficulties being how to convince employers that investment in training is a sound business decision - but the recommendations in this report are intended to make the first giant leap forward.

Overview of current training activity

This section provides a broad overview of current training activity in the catering and hospitality industry. It draws primarily on data collected from the two major surveys of the industry undertaken by HCTC between October 1994 and February 1995, one of employers and the other of employees. It also draws on in-depth follow up case-studies undertaken with six employers in different industry sectors.

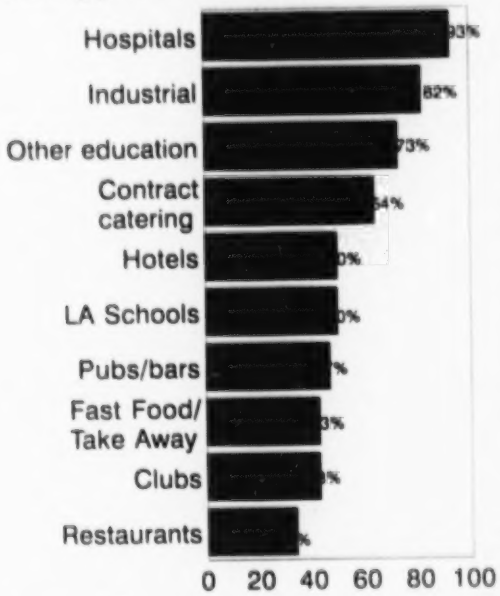
The employer survey involved interviews with 562 employers representing all major sectors of the industry. Face-to-face interviews were carried out with all those employers (319) who indicated that they had provided training, other than induction training, in the past 12 months. Employers were informed at the outset that this included both formal and informal, on and off-the-job training. The rest (243 employers), who had not carried out training, other than induction training in the past 12 months, were interviewed by telephone. All employers who participated in the survey were asked if they would allow their staff to participate in a postal survey.

The employee survey questionnaires were sent to all employers to distribute to all of their staff. In all, 1,319 employees responded from 287 (about 50%) employers. Just under 60% of employee responses came from training active organisations.

Current training activity

Over half (57%) of all employers participating in the employer survey (562 employers) said they had provided some training for their staff other than induction training in the past 12 months. In general, those establishments in the catering services

Figure 2.1
Training provision by sector



Base: All employers (562)

sectors (i.e.. catering in education, hospitals, and industry) were more likely to train staff than in the commercial sectors (i.e. hotels, restaurants, pubs and clubs). There were, however, large variations between specific industry sectors.

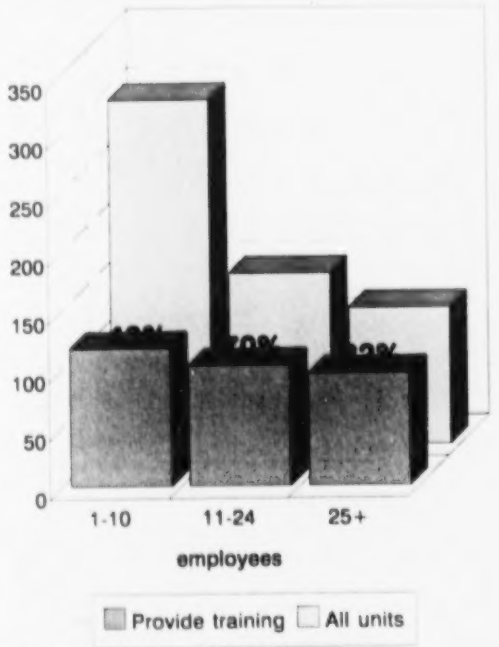
Figure 2.1 shows that nearly all respondent hospital caterers (93%) trained staff as did 82% of industrial catering units and two-thirds of caterers in education establishments and contract caterers. Half of all hotels and pubs provided training, with restaurants least likely to train staff (43% of fast food/take away outlets and only 34% of traditional restaurants had trained staff in the past year).

These differences can partially be explained by the fact that establishments in the catering services sectors tended to be larger but, also perhaps the existence of a stronger training culture in those industries where catering services are not the main purpose of the business (of all establishments employing over 25 staff across the UK economy, hotel and catering establishments show the lowest level of training activity[1]).

As Figure 2.2 shows, larger establishments were much more likely to train than smaller establishments. Differences in training activity by size of establishment were more marked in the commercial sectors than the catering services.

In the fast food/take-away sector, only a quarter of small establishments (those employing up to ten staff) trained, compared with 55% of medium establishments (11-24 staff), and all large establishments (over 25 staff).

Figure 2.2
Training provision by size



Base: employers providing training (319)

1. Skill Needs in Britain 1994, Employment Department/IFF

In hotels and traditional restaurants, only a third of small and medium establishments provided training, compared with 85% of large establishments. This suggests a difference in training priorities between the small independents, take aways and the large chains.

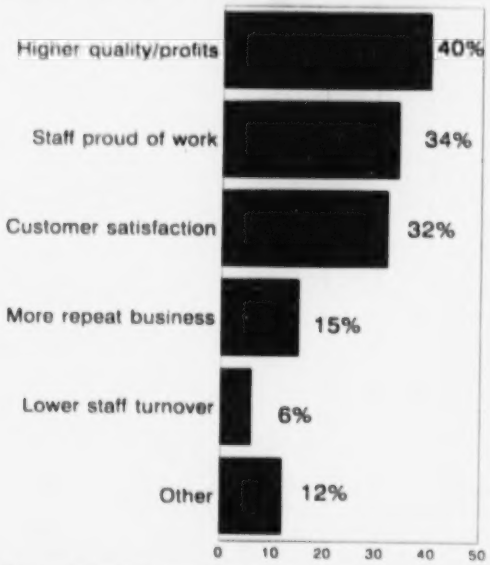
There was less difference by size in the pub sector: 40% of small and large establishments provided training compared to 66% of medium establishments.

Benefits of training

The main reasons given by employers for providing training were to:

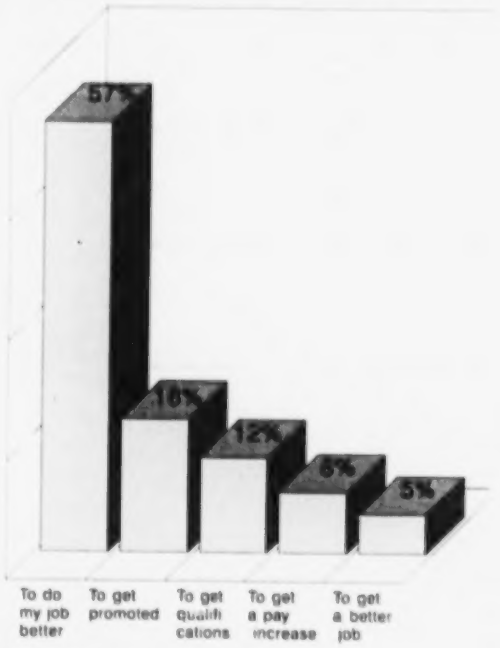
- ensure staff had the necessary skills for the job (37% of respondents);
- to improve the quality of staff (28%);
- to meet statutory requirements (23%);
- to achieve business aims (20%).

Figure 2.3
Employers' perceived benefits of training



Base: Employers providing training (319)

Figure 2.4
Employers' perceived benefits of training



Base: All employees (1,319)

The majority of employers who provided training saw a positive association between training provision and staff retention, with 66% reporting that staff were more likely to stay as a result of training.

Most employers providing training (84%) associated it with tangible benefits. Figure 2.3 shows the specific benefits identified by employers, of which increased quality/ profits (40%), staff having greater pride in their work (34%) and raised levels of customer satisfaction (32%) were the most frequently stated benefits.

Figure 2.4 shows the beneficial outcomes of training mentioned by employees, of which 'to do their job better' was by far the most frequently mentioned benefit of training.

Younger respondents were most interested in the prospect of achieving a qualification, with more mature employees most likely to have mentioned improved job performance.

Most employees, regardless of whether they viewed their position as a job or a career, saw training as a means of improving performance in their current position. However, 28% of those who believed that they had a ***career*** in the industry felt that training would improve their prospects for promotion, compared with 12% who considered that they had a job.

Planning training

The Investors in People (IiP) standard, generally recognises that it is good practice to establish a training plan and budget for training, though clearly the lack of a formal plan or specific budget for training does not preclude the likelihood of training taking place.

Over a half (55%) of the employers who provided training had a formal (written) training plan (i.e. 31% of ***all*** employers and 75% of those employers with a training budget were much more likely to have a training plan).

Large employers were more likely to have a plan than small and medium-sized employers; almost two-thirds (63%) of those who provided training had a formal plan (representing 51% of all large employers). By comparison, however, a 1994 skill needs survey[2] found that 63% of large establishments (25+ employees) in all industries had a formal written plan, with a further 17% having a less formal plan.

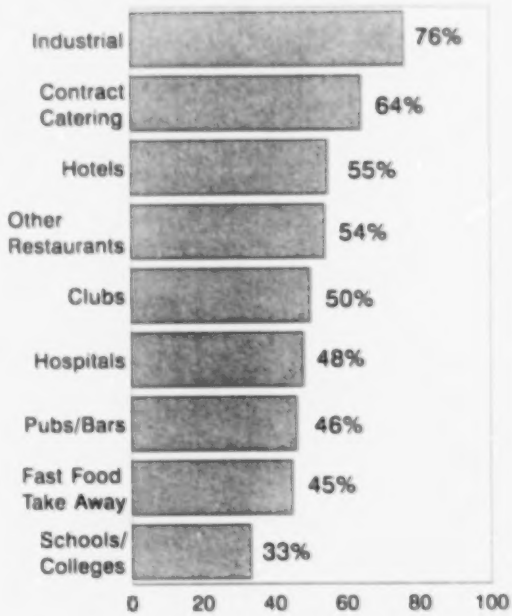
Figure 2.5 shows the proportion of employers by industry sector who provided training and had a formal training plan. Industrial caterers and contract caterers were most likely to have plans (76% and 64%) respectively.

The main reasons for having a training plan were to:

- standardise training;
- keep training up-to-date;
- meet legal requirements;
- promote efficiency.

Although almost half of employers did not have a formal plan, informal versions were clearly also in use.

Figure 2.5
Formal training plan by sector



Base: Employers providing training (319)

2. Skill Needs in Britain 1994, Employment Department/IFF

A strong positive link was identified between establishments in the commercial sectors with a training plan and/or a training budget and those using external trainers.

However, a formal budget often only reflected expenditure on external training fees and did not include the full costs of training in terms of, for example, time given up by staff to undertake in-house training.

The in-depth case studies in small businesses identified a desire, on the part of managers, to develop training activity. It was apparent, however, that these plans, would be unlikely to see 'the light of day' for the foreseeable future given the immediate pressures of work.

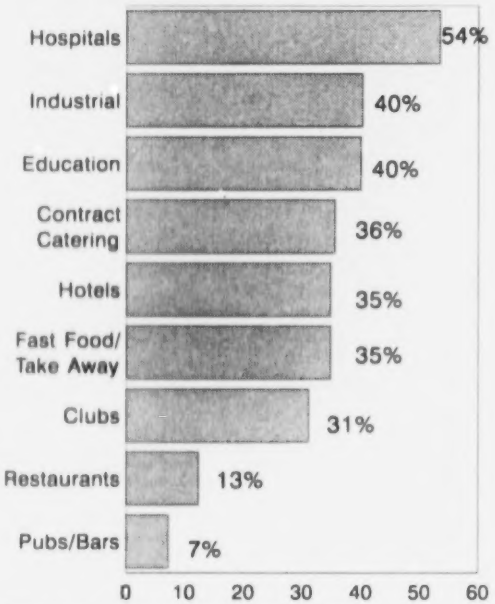
Training spend

Where training was provided, the majority of employers (79%) had paid for it. However, employers were far more likely to pay for training for their permanent staff than their temporary staff.

Only a third of employers who provided training had a set budget for training (representing just 19% of all employers). This varied markedly according to size. Of the small employers who provided training, 20% had a budget, compared to 32% of medium-sized employers and 47% of large employers.

The overall proportion of ***all*** large employers who had a training budget (39%) does not compare well with the 55% of large employers with a training budget in all industries[3].

Figure 2.6
Training budget by sector



Base: Employers providing training (319)

The catering services sectors were more likely than the commercial sectors to have a training budget. Figure 2.6 shows that over half of hospitals and 40% of both industrial catering and educational establishments surveyed had a training budget, compared to only 7% of pubs/bars and 13% of traditional restaurants.

Half of the establishments with a training budget, reported an increase in the budget compared with the previous year and, in a further 40%, it stayed the same. Just under half (48%) of the employers who had a budget for training, expected it to increase and 42% expected it to stay the same next year.

3. Skill Needs in Britain 1994, Employment Department/IFF

Recruitment requirements

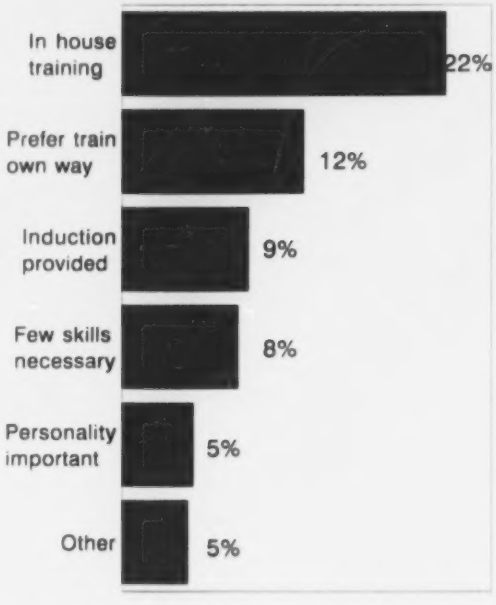
Almost two-thirds of employers surveyed said that staff were not required to have the necessary skills for their job on recruitment.

As shown in Figure 2.7, the most common reason given for this was that some form of in-house training was provided. Many managers also liked to train staff in their own way. Further analysis showed that of the third who did require staff to have the right skills on recruitment 44% of them had not provided training.

As Table 2.1 illustrates, there was some variation by sector in that induction training was more likely to be considered sufficient in the fast-food sector, while fewer skills were considered necessary for new staff in schools catering. Contract caterers and traditional restaurants were more likely to claim they provided adequate in-house training.

Figure 2.7

Reasons for staff not having the necessary skills on recruitment



Base: All employers (562)

Table 2.1

Reasons for not recruiting staff with necessary skills by sector (%)

	Hotels	Fast Food	Restau-rants	Pubs/ Bars	Clubs	Contract Catering	Industry	Hosp-itals	Local Authority /Schools	Other Education Estab
Induction provided	11	32	9	14	21	21	5	17	0	29
Personality important	7	7	3	5	8	0	29	4	0	14
Prefer to train own way	26	7	14	42	17	0	0	13	0	0
Few skills necessary	7	25	14	4	4	29	18	25	57	29
In-house training	33	29	54	32	33	57	40	46	43	29
Can't get experienced staff	6	0	0	0	0	0	3	0	0	0
Other	11	4	6	3	17	0	13	0	0	0

The reasons given by those employers who stated that skills were essential at the point of recruitment, were that staff had to work unsupervised and that there was no available time or resources for training.

The importance placed on recruiting skilled staff was greater in large establishments (44%) than in smaller establishments (35%), despite the fact that larger establishments were more likely to train. Previous HCTC research showed that managers in larger companies were less likely to feel that staff fully met their expectations[4] and suggested that these managers had higher expectations of staff, because they would be more frequently required to work unsupervised.

Figure 2.8 shows that the majority of hospitals, universities/colleges and industrial catering units thought it important to recruit staff with the necessary skills.

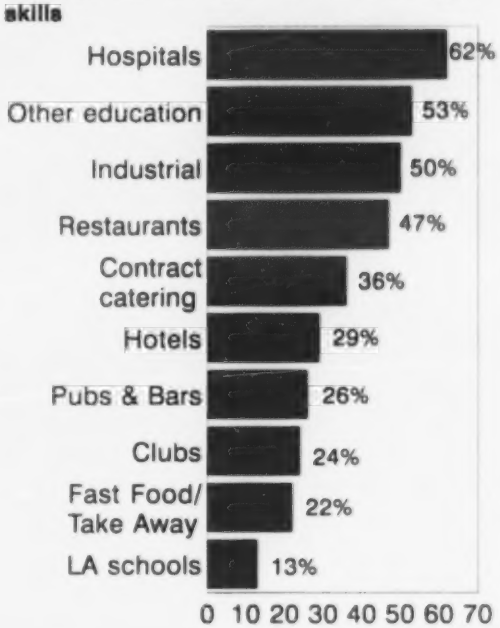
The in-depth case studies demonstrated that enthusiasm, common sense and the ability to communicate were regarded as the most essential skills as basic training could always be provided. Experience was considered significantly more important than qualifications which did not always guarantee the right practical skills for the job.

As might be expected, it was those employers who sought staff with the necessary skills who were most likely to report difficulties in recruiting staff over the previous year.

Earlier HCTC research[5] showed that, of the qualities sought in an ideal employee, 'good social skills' was identified by the majority of employers as the most important quality. The same research identified that while the majority of employers thought it critical or important that, on recruitment, managers (82%); craft employees (81%); and supervisors (72%); had previous industry experience, only 37% considered it critical or important for operative staff.

Figure 2.8

Employers recruiting staff with necessary skills



Base: All employers (562)

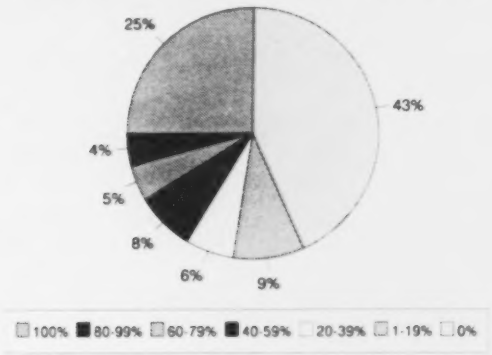
Proportion of staff trained

Figure 2.9 shows that 43% of employers had ***not*** trained any staff, while at the other extreme only a quarter of employers had trained ***all*** their staff in the past year. Looking just at those employers who provided training, less than half (42%) of the employers providing training had trained ***all*** their staff in the past 12 months.

4. Meeting Competence Needs in the Hotel and Catering Training Industry, HCTC 1992, pp50-51

5. Employment Flows in the Catering and Hospitality Industry, HCTC 1994, pp 33-34

Figure 2.9
Proportion of employees trained by employers



Base: All employers (562)

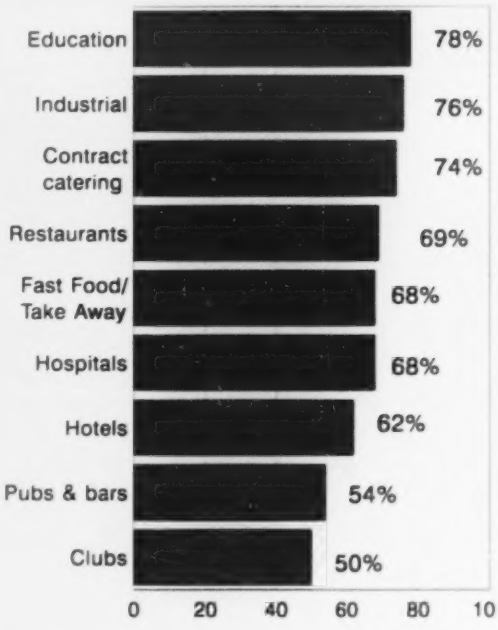
Contract caterers and catering departments in industry were the most likely to have provided training for their entire workforce. On the other hand, hospitals, pubs, restaurants and educational establishments had only trained a small proportion of their staff in the past 12 months.

This is consistent with findings from the employee survey, which found that only two-thirds of staff had received training in their current job (excluding induction and practical instruction on first starting work).

Figure 2.10 shows that employees in education (78%), industrial sectors (76%) and contract catering (74%) were most likely to have received some training. The proportions fell to 54% and 50% for pubs and clubs respectively. Establishments employing over 25 staff were more likely than smaller establishments to train all staff.

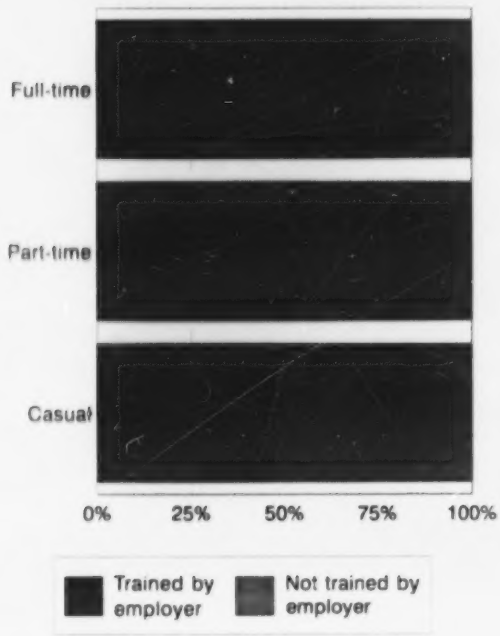
There was generally little difference in the provision of training for men and women, which was a little surprising given that a previous HCTC study suggested female employees were less likely to receive training because they most frequently occupied part-time positions where training was less likely. Part-time staff were however under-represented in the survey (part-time and casual staff accounted for only 36% of responses despite representing about 66% of the total workforce) which suggests that the findings of the two studies are therefore consistent. Figure 2.11, shows that those in full-time employment were significantly more likely to have received training (74%) than their part-time or casual counterparts (59% and 47% respectively). The provision of training was also relatively low for temporary staff (30%), but rose to 70% for permanent staff.

Figure 2.10
Employees who received training by sector



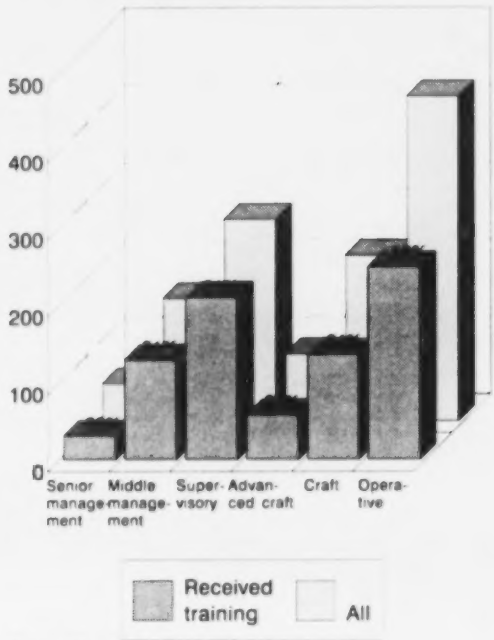
Base: All employees (1,319)

Figure 2.11
Employees trained by employment status



Source: All employees (1,819)

Figure 2.12
Employees trained by occupational level with current employer



Base: All employees (1,319)

Figure 2.12 shows the numbers and proportions of respondent employees who had received training. The vast majority (81%) of employees at middle management and supervisory levels had received training in their current job, with provision declining to around two-thirds of employees at both ends of the occupational spectrum; senior management level and craft/operative levels.

A greater proportion of employees who viewed their work as a career had received training than those who considered their position to be a job.

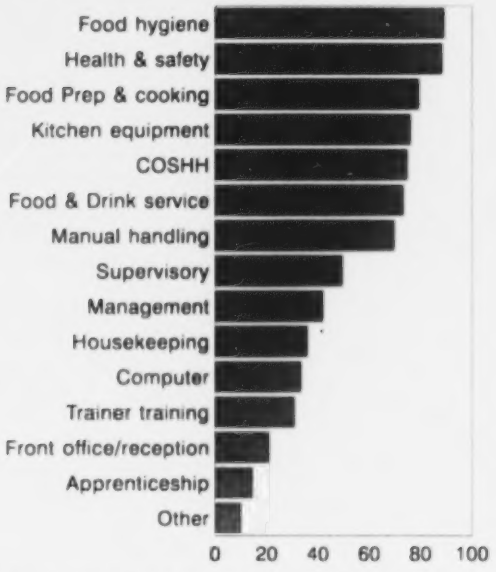
Types of training

Training to meet perceived statutory or inspection requirements (e.g. food hygiene, health and safety, COSHH and manual handling) was most commonly undertaken. The two areas most often the subject of training were food hygiene and health and safety; provided by 51% and 50% of establishments respectively (i.e. 92% and 91% of those establishments providing training as shown in Figure 2.13).

This corresponded with the findings of a previous HCTC study[6], which found that most training activity was to ensure compliance with perceived statutory legislation.

6. Meeting Competence Needs in the Hotel and Catering Industry, HCTC 1992

Figure 2.13
Types of training provided by employers who offered staff training



Base: All training Active Employers: 319

Training in food preparation and cooking was provided by 39% of employers (81% of those providing training); 37% had provided training in the use of kitchen equipment (78% of those providing training - frequently provided by suppliers) and 36% provided training in food and drink service (75% of employers providing training).

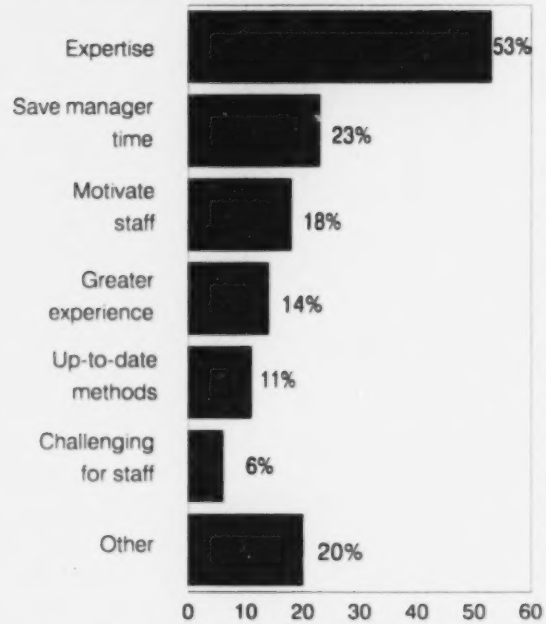
These findings were confirmed by those from the employee survey. Almost half (45%) of all employees surveyed said that they had received health and safety training, 39% food hygiene training and 15% fire training in the past three years. By comparison, 24% of employees had received training in food preparation and cooking (though such training would not be relevant to all staff), 15% in customer care and 14% in management.

Over the past three years, 21% of employees had ***only*** received training related to statutory provisions or subject to local inspections (e.g. health and safety, food hygiene, control of substances hazardous to health (COSHH), manual handling and/or fire training). Nearly two-thirds of employees had received a mix of the above and other types of training, while 17% of staff had received no training in the past three years.

Managers, supervisors and advanced craft staff were most likely to have received a mix of different types of training. Craft and operative staff were more likely not to have received any training or to have received only statutory-related training. A higher proportion of staff in hotels, fast food and contract catering received a mix of statutory related and other training than in other sectors.

Under a third (29%) of employers provided training leading to recognised qualifications (61% of employers providing training). On the face of it this appeared high, however, closer investigation revealed that of these few employers providing training leading to qualifications, 38% were providing training leading to a basic food hygiene certificate (a further 8% provided training towards the advanced hygiene certificate). Just over a third (34%) of these employers had staff training towards NVQs/SVQs, though many of these were on Youth Training (YT) or Training for Work (TfW) schemes, while just 16% had staff training towards professional qualifications.

Figure 2.14
Advantages of external trainers



Base: Employers providing training (319)

Sources of training

Virtually all employers who provided training provided some form of in-house training. External trainers were also used by 62% of all employers providing training (i.e. 35% of all employers) and used more frequently by larger than smaller establishments. Over three-quarters of caterers in education and contract catering who provided training used external trainers.

Those employers who used external training providers identified the advantages of using them as:

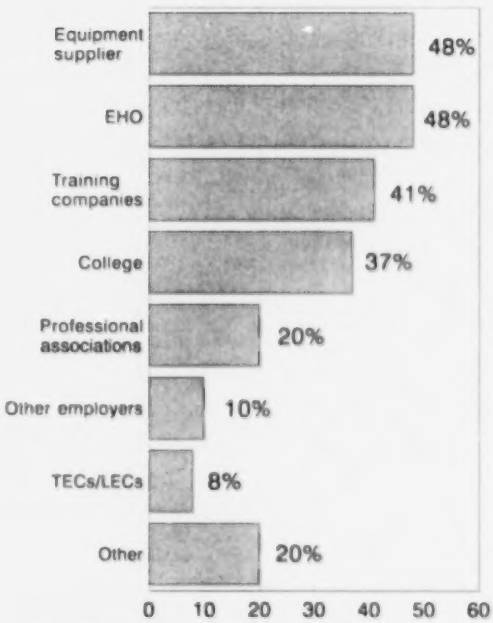
- accessing external expertise (mentioned by 53% of establishments);
- saving managers time (23%).
(see Figure 2.14)

The main disadvantages associated with using external trainers were principally: the expense (48%), staff having to travel (23%), and trainers being unaware of individual business requirements (16%).

Figure 2.15 shows the types of external trainers used. Environmental Health Officers (EHOs) and equipment suppliers were the most common sources of training (both used by 48% of all those using external trainers - i.e. 27% of all industry employers).

Private training companies were used by 41% of employers using external trainers (i.e. just 23% of all industry employers) and by 37% of those with over 25 staff who used external trainers.

Figure 2.15
Type of external trainers used



Base: Employers providing training (319)

Overview of current training activity

Over 70% of clubs, fast food establishments and hospitals used EHOs. The relatively high proportions reflected the prevalence of food hygiene and health and safety training in the industry. Indeed, external trainers were most frequently used to provide food hygiene, health and safety and COSHH programmes.

In the commercial sectors, employers also tended to use external trainers for manual handling, computer skills and management training. Colleges were used by 37% of those using external trainers and by over half of all hospitals and hotels.

Of those employers who trained but did not use external training providers, 37% considered them unnecessary, 28% felt that in-house training was sufficient and 18% thought that external trainers were too expensive.

Detailed case studies with a number of employers revealed that external training programmes were often inaccessible to small employers because they frequently required attendance for one or two full days. This caused a problem which was not so much down to the the cost of the programme but to the fact that it did not fit in with the needs of the business. In particular, was difficult to provide adequate cover for staff absent on courses. Half day morning courses were identified as being particularly suitable for staff employed in pubs and restaurants.

Some employers also indicated difficulty in accessing information about existing external training provision. Quite simply, they just did not know what was available of how to find out about it.

Training Methods

The most frequently used training methods by employers were instruction by colleagues/ supervisors (used by 80% of employers providing training), learning by observation (79% of employers providing training) and demonstrations (76% of employers providing training). In-house training programmes were also used in 62% of establishments training staff. Most off-the-job training was classroom-based although all trainers interviewed mentioned the importance of interactive styles of training (i.e. involving employees in workshops, problem-solving exercises, role play, etc.) Trainers attributed the importance of these styles to the nature of work in the industry where staff need to work effectively in teams.

The detailed case studies confirmed the importance of on-the-job training, particularly at lower occupational levels. In one establishment, around 95% of training for grades up to supervisory level was on-the-job, with the remainder consisting of videos and simple workbooks. In smaller establishments, however, staff were often required to learn skills on-the-job without the benefit of any training as they were frequently recruited to fill an immediate vacancy offering no time for induction or preliminary training. Mentors or 'buddies' were sometimes provided to help these individuals who were effectively 'thrown in at the deep-end'.

Three-quarters of all employers providing training said that they used support materials, such as textbooks, videos, workbooks and visual aids. It was felt that they made training more accessible and interesting to employees. Support materials were sometimes provided on induction which established an initial training

programme for new staff. For example, induction packs containing a staff handbook, details on the company, basic standards, procedures and checklists were provided in some of the larger companies or chains.

Measuring effectiveness

The importance of measuring the effectiveness of training cannot be stressed enough. It is as important, if not more so, than proper planning and delivery. Only by evaluating thoroughly, can the impact of the training be assessed and the quality of the training assured. Nearly three quarters (72%) of employers providing training stated that they also measured its effectiveness. The main reasons given for doing this were to:

- make improvements to the training provided (34%);
- to check that training was a beneficial investment (24%).

On the face it, the number of training active employers evaluating training appeared high, however, many employers evaluated training in a very informal manner; for example by ad-hoc observation of post-training performance and by putting remedial measures in place only if an obvious problem was identified.

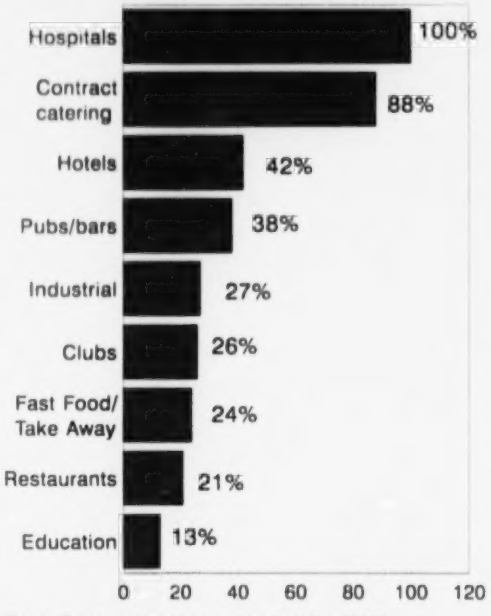
Only half of employees surveyed were aware that their employer had checked if the last training they received was effective - younger respondents and casual workers were least likely to have been asked.

In many establishments there was no tradition of training evaluation, with no systems in place to record training. The main reasons given for not assessing and evaluating training were a lack of time and a lack of established procedures. However, there was a general awareness of the importance of assessment and evaluation and its role in revealing whether business performance had improved. As revealed later in this report, training providers themselves showed little initiative in evaluating the effect of their training programmes. The majority of employees 60% (628) who had received training in their current jobs said their managers had checked if their last training received was effective and 93% of employees felt the training had been sufficient.

Constraints on training

Some 43% of employers said that they had not provided any training for staff (other than induction) in the 12 months prior to being surveyed. However, a third of these employers had provided training in previous years. Only 28% of small establishments not currently training had provided training in

Figure 2.16
Employers who provided training in the past by sector



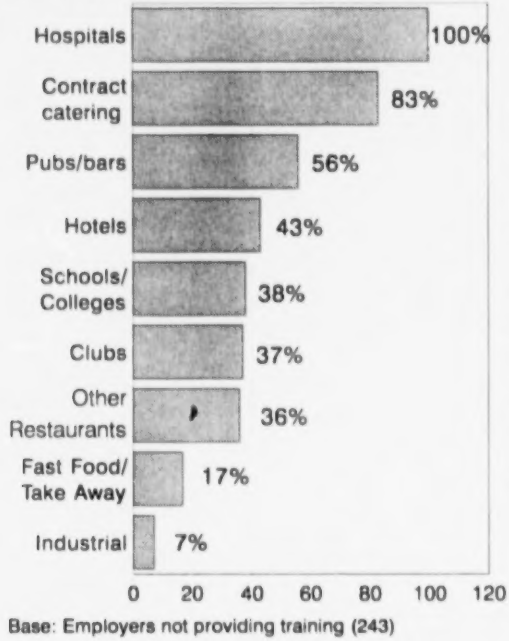
Base: Employers not providng training (243)

the past; but 76% of large establishments had done so.

There was wide variation by sector and Figure 2.16 shows the employers who had provided training in the past by sector, but who had not trained in the past year.

Overall, this suggests that some employers did not see training as an on-going development process, but rather as a 'one-off fix' or 'fire-fighting' process to provide specific skills, or deal with particular problems. The main reason given by employers for the lack of training provision was that employed staff already had adequate skills to do their job, or had received induction training which provided all the requisite skills, such that further training was not required. However, these employers were least likely to audit skill needs or formally ask employees about their own requirements.

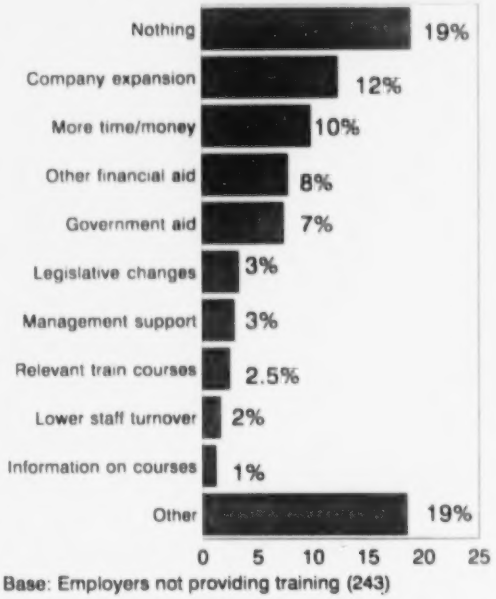
Figure 2.17
Employers who intend to provide training in future by sector



Base: Employers not providing training (243)

Nearly half (42%) of employers who had not trained in the past year said that they would provide training in the future. There was a marked difference by size of establishment, with 39% of small establishments responding positively compared to 68% of large establishments. As shown in Figure 2.17, all hospitals and 83% of contract caterers intended to train in the future, but only 17% of fast food restaurants and just 7% of industrial catering units had any intention of doing so.

Figure 2.18
Factors that would encourage employers to train in the future



Base: Employers not providing training (243)

The major factors that would encourage employers who did not train in the past year, to train in the future, are given in Figure 2.18. Company expansion and more resources were the most frequently mentioned factors reflecting the perceived barriers to training of many small and medium sized employers.

The pressures of many smaller businesses were such that it was difficult to set time aside for training. Planned training often had to be postponed or even conducted in the employees' own time. For example, it was common for staff to attend college courses on their days off. Case studies revealed that training provision was inflexible and not sensitive to the needs of the business. Managers felt that it would be more convenient for staff to be trained over a series of mornings before opening, rather than taking up one or two whole days.

Cost was another important factor, particularly for small establishments with no head office support. A number of managers stated that they could afford course fees but not the additional expenses incurred in covering the employee's position while training.

For large employers, the availability of relevant training programmes was the major factor which would encourage them to train in the future. Some employers were unaware of sources of appropriate programmes for them.

Figure 2.19 shows that the vast majority of employers not providing training were prepared to offer some help towards accessing training for their employees, but any help which had cost implications was significantly less popular!

Over half of employers not providing training (59%), were prepared to offer encouragement, with a further 57% willing to give practical guidance. However, only 16% of employers were prepared to pay full programme fees, with 25% willing to ***help*** pay fees and 31% prepared to reduce staff hours of work. Financial aid was far more likely to be forthcoming from larger employers.

Figure 2.19
Types of assistance employers are prepared to offer to employees to train

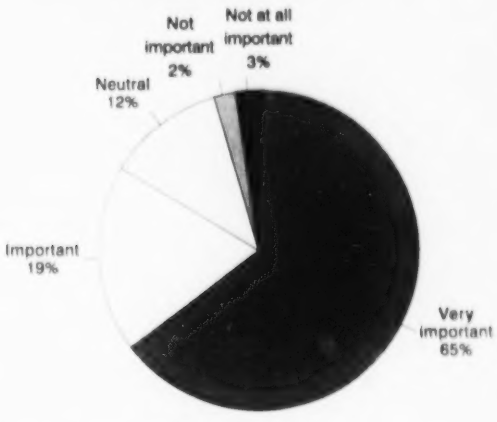
Base: Employers not providing training (243)

Employee attitudes to training

Figure 2.20 shows that over three-quarters of all employees thought training was important for their future, but there were some differences by occupational level: with craft and operative level staff placing marginally less importance on it than supervisors and managers.

Employees provided an extensive list of training that they would like to receive. The most common being management training (15% of respondents) and computer training (7% of respondents). Some 12% of respondents felt that they did not need any further training for their development, while 10% of respondents felt that ***any*** training would be useful.

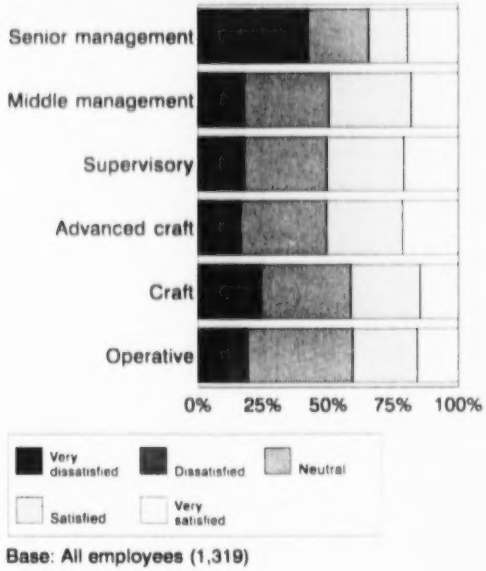
Figure 2.20
Importance of training opportunities to employees for future development



Base: All employees (1,319)

Although recognising the importance of training for future development, employees failed to recognise the importance of continuing development through training. The most common reason identified by employees for not having received training being that there was no need for it. As Figure 2.21 shows, there were generally more staff satisfied than dissatisfied with their training, but staff were on the whole satisfied with training opportunities in their present job, though there were a lot of neutral responses.

Figure 2.21
Employee satisfaction with training opportunities in present job

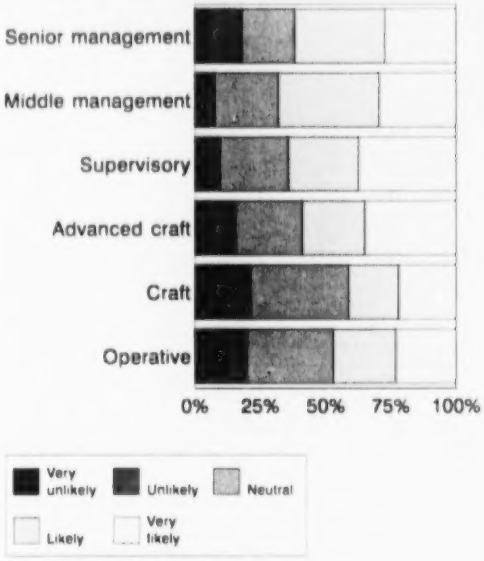


Base: All employees (1,319)

Figure 2.22 shows that employees also thought it quite likely that they would receive training with their existing employer, with those in more senior positions thinking it more likely.

The in-depth case studies revealed that some staff felt that they were already quite capable of doing their job and found the suggestion that they needed training insulting. This view contrasted with case studies undertaken where training had been recognised through NVQs. Staff viewed NVQs as a means of personal development, recognition of their skills and providing them with a real sense of achievement.

Figure 2.22
Likelihood of employees receiving training with current employer in the future by occupational level



Base: All employees (1,319)

Summary

- With some notable exceptions, most employers in the industry are not taking training seriously.
- Over 40% of employers said that they had not provided any training for staff other than induction in the past year. It was apparent, however, that not all of these employers were completely averse to training, as just under a half had trained in the past and 42% expected to train in the future, but they did not see the benefits of on-going, planned and evaluated development of staff.
- Particular barriers to training identified were:
  - employers believed staff were adequately skilled to do the job;
  - training only seen as a one-off 'fire-fighting' measure to tackle particular problems;
  - a lack of resources, including money and time, to train staff;
  - lack of appropriate training to meet business needs;
  - lack of information on the sources of training.
- Such training activity as there was, across the industry, was largely undertaken to meet a perceived or real statutory or inspection requirement (i.e. food hygiene, health and safety, fire safety, etc.), with employers generally reluctant to take responsibility for general staff development through training. Training activity was highest in the catering services sectors (i.e. catering in education, hospitals, industry, etc.). Activity was lowest in the commercial sectors (particularly restaurants, pubs and clubs) and in smaller establishments.
- Staff in lower occupational levels were least likely to have received training in their current job, as were part-time and casual staff, despite representing the majority of staff who were frequently involved in customer contact. Part-time staff were also often the longest serving employees.
- The vast majority of employers providing training (84%) said they had identified tangible business benefits from training, including increased quality and profits, improved staff commitment and increased customer satisfaction.
- Formal training plans and budgets were most prevalent in the larger and catering services establishments. It was apparent that they would only be effective if combined with other good practice in training provision, best identified by the IiP initiative.
- Although 62% of employers providing training used external trainers, these were most commonly environmental health officers (EHOs - reflecting the high levels of food hygiene training) and equipment suppliers. In practice, however, training providers were only used by a minority of employers, with only 27% of all industry employers using EHOs and just 23% using training companies, suggesting that there is a large untapped market for training providers to meet.
- In-house on-the-job training was widely used in the industry and it was identified that off-the-job training involved considerable use of interactive learning styles, reflecting the practical and communicative nature of the work. It was apparent, however, that in many cases, staff received little training and were all too frequently left to learn the job as they went along with no real training development or guidance to assist them.
- Few employers (or for that matter training providers) formally evaluated the effectiveness of training provided. This despite the fact that they recognised the importance of it in assessing whether training resulted in improved business performance.

Industry response to national training initiatives

This section provides an examination of the industry's response to existing national training initiatives. It provides some indication of the levels of take-up of such initiatives by this industry and their impact on overall training provision.

NVQs/SVQs

National and Scottish Vocational Qualifications were first launched in this industry in January 1992. By 30th June 1995, over 1,000 centres were approved to offer NVQs/SVQs in catering and hospitality throughout the UK (including colleges, employers, training providers and managing agents for YT and TfW). Over 140,000 individuals were registered to work towards the qualifications and over 27,000 had already achieved them. Although accounting for only about a third of approved centres, colleges operating Realistic Work Environments accounted for the majority of registrations although proportions in industry centres were gradually increasing.

Until recently, take-up of NVQs/SVQs has been roughly in line with expectations for the catering and hospitality industry, (published in the HCTC's first 'Implementation Action Plan' in January 1993). This plan recognised that the National Education and Training Targets (NETTs)[7], established by the CBI and

7. The National Education and Training Targets have since been reviewed and new targets set as follows:

1. 60% of the workforce to be qualified to NVQ level 3, Advanced GNVQ or 2 GCE A level standard.
2. .30% of the workforce to have a vocational professional, management or academic qualification at NVQ level 4 or above.
3. .70% of all organisations employing 200 or more employers, and 35% of those employing 50 or more, to be recognised as Investors in People.

endorsed by government, were not easily applied to this industry. In particular, the NETTs set targets that by 1996 50% of the workforce should be aiming for NVQs/SVQs or units towards them and that by the year 2000, 50% of the workforce should be qualified to at least NVQ/SVQ level 3 or equivalent. The vast majority of the catering and hospitality workforce is employed in occupations below level 3 and it was therefore regarded as an inappropriate target for this industry; a view acknowledged by the then Employment Department.

Other problems envisaged at that time were:

- the very high proportion of small employers in this industry;
- the high levels of staff turnover;
- the high proportions of part-time and casual labour employed in the industry.

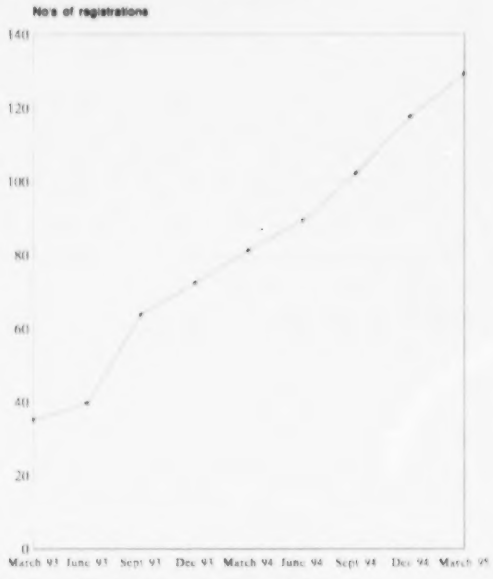
The industry therefore established its own targets, given in Table 3.1, considered more relevant to its own needs.

Table 3.1
Summary of the targets published in the first Implementation Action Plan — January 1993

Year	Cumulative Total
1992/93	18,507
1993/94	62,534
1994/95	186,142
1995/96	600,575

So far, these targets have been matched by actual take-up, although recent evidence has shown that the rate of take-up has not increased in line with expectations (see Figure 3.1). This is largely as a result of the need to overcome barriers to take-up and

Figure 3.1
Rate of Take-Up of NVQ/SVQ registrations (000s) March 1993-June 1995



Source: HCTC from Awarding Bodies

employers awaiting the outcome of a recent review and update of the qualifications.

The 'NVQ/SVQ Implementation Action Plan - Stage 4', published by the HCTC in March 1995 set new, more ambitious targets for the implementation of NVQs/SVQs for the future (see Table 3.2). These targets, forecast an acceleration in take-up as a direct result of:

- improvements arising from the review and update of the qualifications;
- practical initiatives being put into place by all the partners responding to the HCTC Implementation Action Plans, which are designed to remove identified barriers.
- proactive responses from industry trade, professional and other bodies and associations to encourage involvement and promote the benefits to employers.

Table 3.2
Phased targets for NVQ/SVQ registrations 1995-1998

Year	Target
31st March 1995	150,000
31st March 1996	350,000
31st March 1997	500,000
31st March 1998	700,000

Less than 15% of the 562 employers in the HCTC survey had employees working towards NVQs/SVQs. Many of these were employed as YT and TfW trainees. Only in a few cases were these employers directly involved with formal training or assessment of the candidates. A further 11% of employers were considering introducing NVQs/SVQs in the future.

It is known that with a few notable exceptions NVQs/SVQs have not been implemented in smaller establishments in this industry. HCTC, in its Lead Body capacity, has identified that this is because of:

- difficulties in establishing assessment mechanisms;
- the level of perceived bureaucracy involved in implementation;
- cost.

Awareness of NVQs/SVQs was low amongst small employers, which might also have affected take-up in these establishments (see below).

Consortia and umbrella arrangements with other employers and colleges are beginning to open up opportunities for smaller employers, but these have been slow to develop.

The introduction of the revised NVQs/SVQs geared specifically to multi-skilled staff (preparing and serving food at level 1, quick service at level 2 and guest service at levels 1 and 2) might also help take-up in smaller organisations, primarily because they are more in tune with their needs than the previous provision.

The employers' survey and case studies identified a number of reasons for the slow rate of take-up of NVQs/SVQs in the industry. These included:

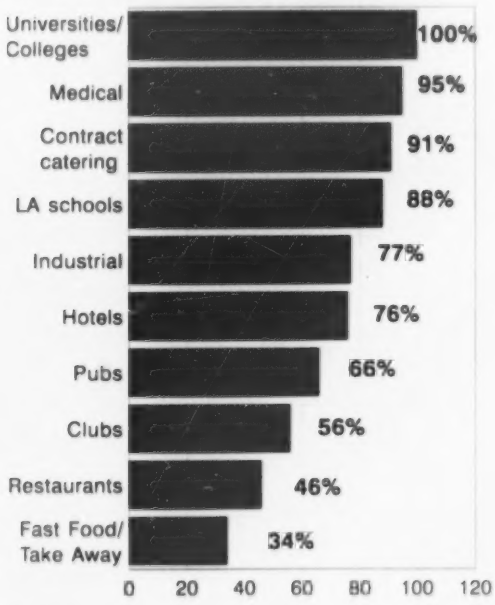
- relatively high proportions of employers who chose only to recruit staff with the necessary skills to do the job (37%);
- employers who believed either their staff did not need any special skills, or they preferred to train staff their own way using their own induction and in-house training provision (49%);
- employers who identified that staff needed to be multi-skilled to meet the needs of the business.

Employers had generally failed to make the connection between their own training provision and the opportunity to use NVQs/SVQs to enhance the value of training by providing recognition of the outcomes.

While the majority of all employers surveyed (69%) were aware of NVQs/SVQs, there were variations according to size. Of the small employers, 59% had heard of NVQs/SVQs compared with 91% of large employers and 76% of medium-sized employers. Variations by size were more marked in the commercial sectors than the catering services. Only 14% of small fast-food outlets and 43% of small restaurants were aware of NVQs/SVQs but awareness was noticeably higher in all large establishments.

As shown in Figure 3.2 awareness of NVQs/SVQs was highest in the catering services and contract catering sector and lowest in fast food/take away restaurants (34%). The trade press, company information, industry contacts and colleges were most frequently mentioned as sources of information about NVQs/SVQs.

Figure 3.2
NVQ/SVQ awareness by sector

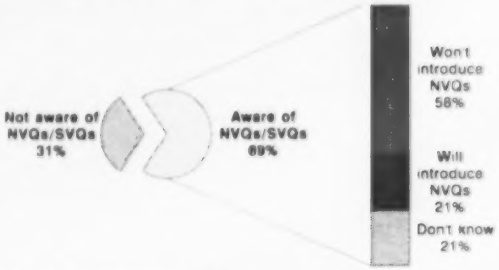


Base: All employers (562)

Figure 3.3 shows that less than a quarter (21%) of all employers surveyed who were aware of NVQs/SVQs were planning to introduce NVQs/SVQs in the future, while 58% had no plans to do so.

Once again, there were a number of size-related variations, with 29% of larger employers who were aware of NVQs/SVQs, planning to introduce them, as opposed to 18% of small employers.

Figure 3.3
Employers aware of NVQs/SVQs and planning to introduce them in future



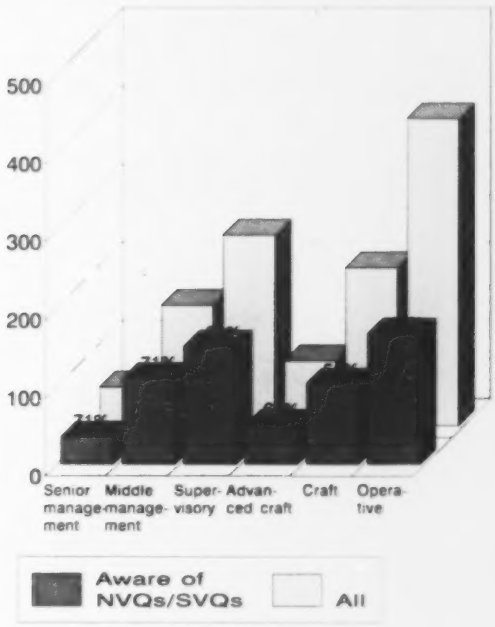
Base: All employers (562)

Of the employers who provided training, 32% had staff working towards NVQs/SVQs (though many of these staff were on government training schemes) and 27% were planning to introduce NVQs/SVQs in the future. Few establishments in the commercial sectors were planning to introduce NVQs/SVQs but larger employers (35%) were more likely to introduce NVQs/SVQs than smaller employers (25%). Hospitals, hotels, pubs and clubs were most likely to introduce NVQs/SVQs.

A number of managers commented that the opportunity to obtain a qualification raised staff morale as employees believed that their company was committed to their development. This was true across the board for both small and large businesses.

Almost half of employees surveyed had heard of NVQs/SVQs; with the highest levels of awareness among males, younger members of staff and full-time employees. There was a positive correlation with occupational level, as shown in Figure 3.4,with 71% of senior management aware of the qualifications, compared with 42% of operative employees. Linked with this,

Figure 3.4
Employees aware of NVQs/SVQs by occupational level



employees who considered themselves to have a 'career' had a greater knowledge of NVQ/SVQs (70% had heard of them) than those with a 'job' (44%). Some 5% (68 employees) of the sample had obtained an NVQ/SVQ (which compares well with the industry as a whole which reports just over one per cent of employees known to have achieved one). A further 88 people were working towards one. There were many more employees working towards NVQ/SVQs in food preparation and cooking or serving food and drink then reception and housekeeping, supervisory or management.

Of those employees who were aware of NVQ/SVQs and not already involved, around half indicated some interest in working towards a qualification. Similar levels of interest were exhibited in all occupational levels up to middle management, by full and part-time workers and by males and females. However, interest was lowest among those aged over 50 years and those working in housekeeping. Reasons given for not wanting to become involved included age, lack of time and already having equivalent qualifications.

Investors in People

Hospitality industry employers had a low level of awareness of the IiP initiative (just 26% aware), indicating a need for wider promotion. Awareness was much higher among larger than smaller employers, with over half of establishments employing over 25 staff being aware of the initiative. Two thirds of contract caterers and over half of hospitals had heard of Investors in People, while at the other extreme, only 20% of pubs, 19% of clubs and 7% of restaurants had done so.

Given the low levels of awareness of the initiative it is perhaps not surprising that less than 3% of all those surveyed (15 out of 560 employers) were actually IiP certified and just 4% (25 employers) were working towards IiP certification. IiP UK claim that 23% of employees nationally, across all industries are employed in the 1,831 IiP 'certified' or 16,221 IiP 'committed' employers (figures at July 1995). A further 7% of employers (38) indicated that they were considering IiP certification.

Interestingly, the smaller industry employers were as likely to be IiP certified, or considering certification, as larger employers, demonstrating perhaps the scope and potential for adoption of the scheme in any size of business.

Involvement in government training schemes

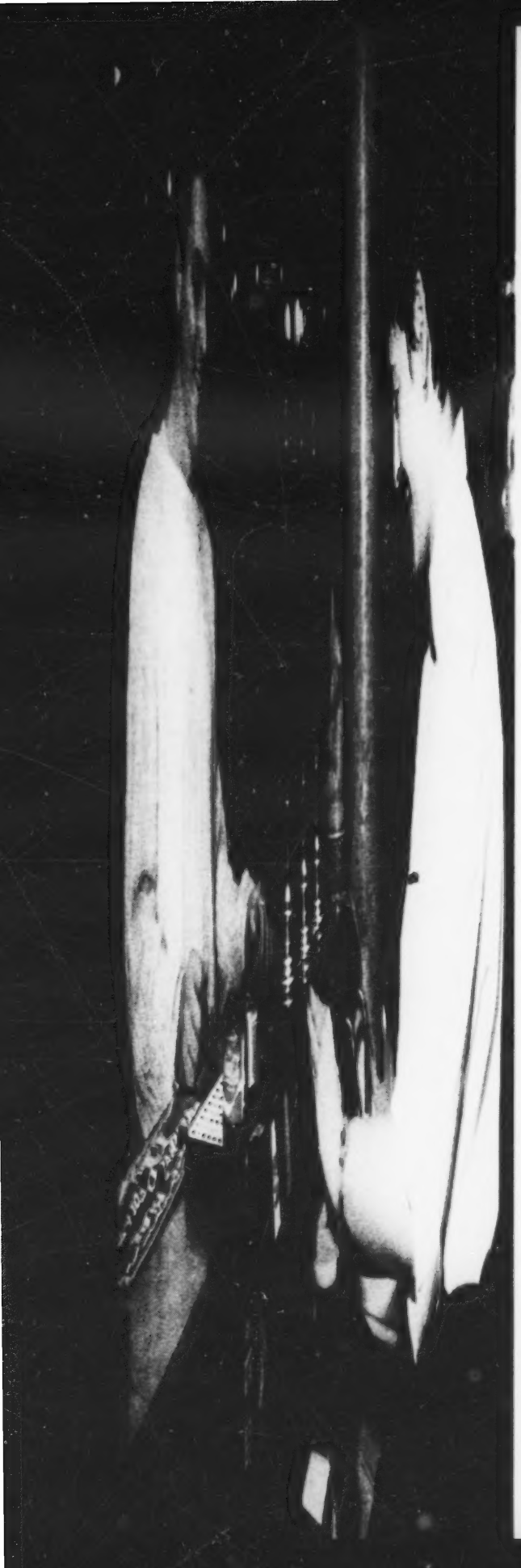
Over half (54%) of employers surveyed were aware of TECs/LECs but only 18% were aware of the services they provided. Only 1% of respondents used TECs/LECs to access staff via government training schemes and a further 1% used TECs/LECs to access general training. Employers did not appear to have identified the assistance available from TECs/LECs with regard to aiding implementation of IiP or NVQs/SVQs.

Regardless of this low level of awareness of TECs/LECs, 10% of establishments had taken on at least one Training for Work trainee in the past 12 months and 13% had taken on at least one Youth Trainee. Large establishments (over 25 staff) were more likely to take on these trainees than smaller establishments.

A higher proportion of contract caterers, industrial caterers and hotels took on Youth Training and Training for Work trainees than other sectors. The main motives for taking on such trainees were to 'give them a chance' (32% of employers) and to provide them with industry experience (22% of employers). A further 12% of employers took on trainees to provide the industry with long term benefits. This motive applied much more to large than small employers. (see also pp 53 - 54).

Summary

- There is still a lack of awareness of NVQs/SVQs in much of the industry outside Youth Training and Training for Work schemes. There is therefore an on-going need to highlight the benefits of NVQs/SVQs to all businesses.
- The lead body have identified a number of factors responsible for the low take up of NVQ/SVQs in catering and hospitality. These include:
  - the high number of small businesses;
  - the long period of time necessary to get ready for NVQ/SVQ implementation;
  - the introduction of the assessment infrastructure;
  - the lack of perceived tangible business benefits flowing from implementation.
  - perceived high cost;
- Awareness of Investors in People (IiP) amongst industry employers was very low (26%), so few employers had identified the benefits of these standards.
- Although over a half of employers were aware of TECs/LECs, only 18% were aware of the services they provide. A number of employers were involved in placing YT and TfW trainees, but there appeared to be a lack of understanding of the assistance available from TECs/LECs to help implement IiP and NVQs/SVQs.



Training needs

This section focuses on the industry's training needs. In so doing, it identifies the extent to which needs are evaluated and how this is done. It also examines the specific skill requirements of existing employees in the hospitality industry. It then reflects on the current and future demand for training in the industry as a precursor to establishing whether those needs are currently being met by the suppliers of training.

Evaluation of training needs

Previous research undertaken by the HCTC[8] indicated that few employers conducted any analysis of training needs. This research, however, indicated that the situation appears to have changed as more employers were getting involved with addressing the issue of skill shortages through determining ***and*** evaluating existing staff training needs.

The majority of employers who provided training in the last twelve months (55%) had a formal training plan, which was used to:

- standardise training;
- keep up-to-date with training needs;
- promote efficiency;
- meet legal requirements;
- keep staff informed about training in the company.

Over half of employers who provided training in the last twelve months used formal appraisals to determine and evaluate staff training needs. Of these 35% considered it their main method for determining training needs, while 58% felt it complemented other less formal methods of assessment.

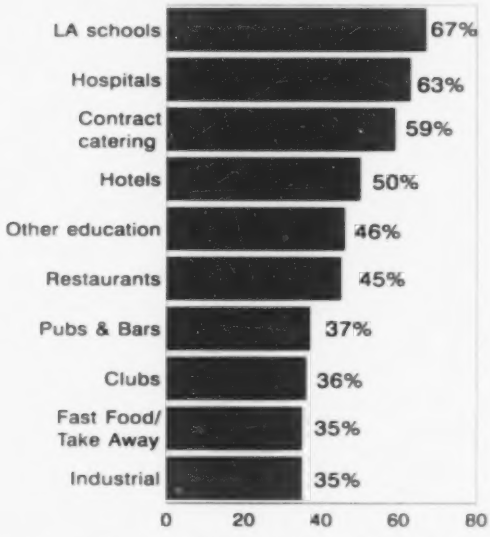
8. Meeting Competence Needs in the Hotel and Catering Industry, HCTC 1992.

Skill needs identified

The vast majority of staff (79%) indicated that they had recruited staff in the last 12 months. Almost half of employers who recruited staff in the past year (44%) had faced difficulties in recruiting staff for specific occupations. The larger employers were more likely to have reported recruitment difficulties.

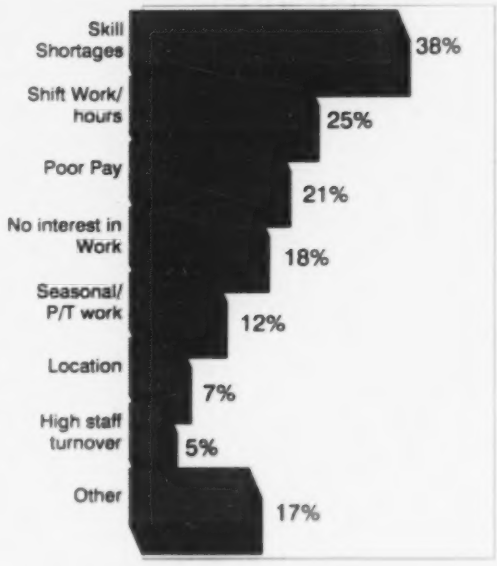
Figure 4.1 shows that those in the catering services and contract catering sectors were most likely to have experienced difficulty recruiting staff (e.g. 67% of schools, 63% of hospitals and 59% of contract caterers, who had recruited staff). Pubs, fast food/take away restaurants and clubs were least likely to report recruitment difficulties (with just over a third in each sector experiencing difficulty).

Figure 4.1
Recruitment difficulties by sector



Base: Employers who had recruited in the past year (442)

Figure 4.2
Reasons for difficulties in recruitment

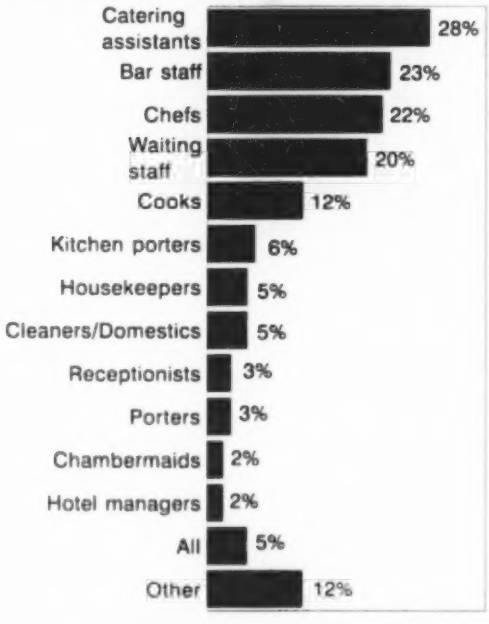


Base: Employers who reported recruitment difficulties (175)

As shown by Figure 4.2, skill shortages (mentioned by 38% of employers with recruitment difficulties), inconvenient working hours (25%), pay (21%) and lack of interest in the industry (18%) were thought to be the main reasons for recruitment difficulties.

Recruitment difficulties were indicative of the prevailing skill shortages in the hospitality industry. The proportions of employers reporting recruitment difficulties by occupation are given in Figure 4.3.

Figure 4.3
Occupations difficult to recruit



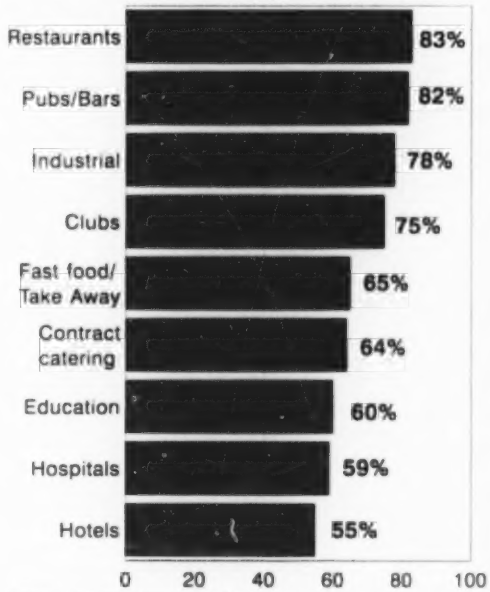
Base: Employers who reported recruitment difficulties (175)

Recruitment difficulties were most apparent in craft and operative level occupations, with the most frequently reported difficulties for catering assistants (28%), bar and waiting staff (23 and 20% respectively), chefs (22%) and cooks (12%).

There was a consensus among three-quarters of employers surveyed that their existing staff had the necessary skills and experience to do their jobs, but this varied by size of establishments. The majority (83%) of small establishments felt that all staff were adequately skilled, compared to 59% in larger establishments (this was a similar finding to that recorded in earlier HCTC[9] research where it was found that larger employers had higher expectations of their staff).

Figure 4.4 shows whether employers thought existing staff were adequately skilled by sector. Existing staff in hotels, school catering, hospital catering and contract catering were least likely to be adequately skilled (40% of hotels, 38% of hospitals and 36% of contract caterers said their staff did not have adequate skills).

Figure 4.4
Employers with adequately skilled staff

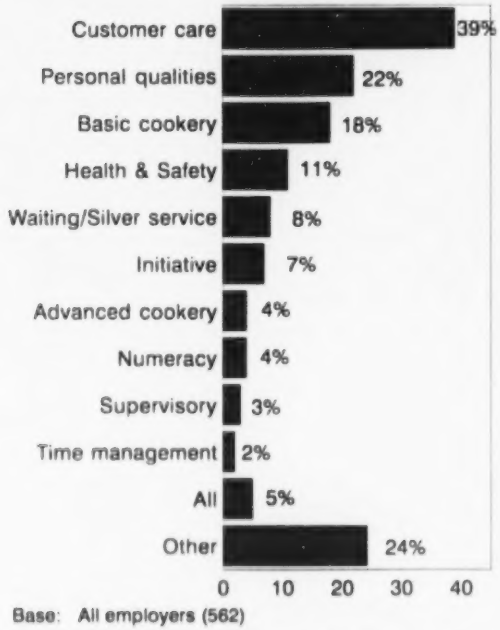


Base: All employers (562)

Figure 4.5 shows the main skills employers felt their existing staff lacked; principally these were customer care (mentioned by 39% of employers), personal qualities - such as a happy disposition/outgoing personality - (22%) and basic cookery (18%). Training providers had reported that they believed skill shortages existed primarily in sales, customer service and at middle management level.

9. Meeting Competence Needs in the Hotel and Catering Industry, HCTC 1992

Figure 4.5
Skills lacking in existing staff



Base: All employers (562)

Of the quarter of employers who felt their staff were not adequately skilled, most had taken a number of steps to overcome these skill shortages in their establishments. A large proportion (72%) said they had provided more training, 13% greater supervision, 11% practice in skills, but 10% said they had dismissed staff lacking appropriate skills.

Of the staff who responded to the employee survey, 92% felt that they had the necessary skills to do their jobs. This finding was consistent with three-quarters of employers who claimed that their staff had the necessary skills to do their jobs.

However, 51% of employees felt that they could usefully enhance their existing skills through training and a large proportion identified specific training they would need for future development. The highest proportion of employees who felt existing skills could be enhanced were employed in hotels, with lowest levels apparent among those working in hospitals and fast food restaurants.

Types of training needed

Even though the vast majority of employees surveyed (92%) indicated that they had the necessary skills to do their jobs, just over a half considered that they could usefully enhance their existing skills through training (though 19% were unsure) and 84% of employees considered that they needed further training for their future development.

Employees indicated an enormous variety of different types of training that they would need. Figure 4.6 shows the main types of training that employees felt they needed for future development.

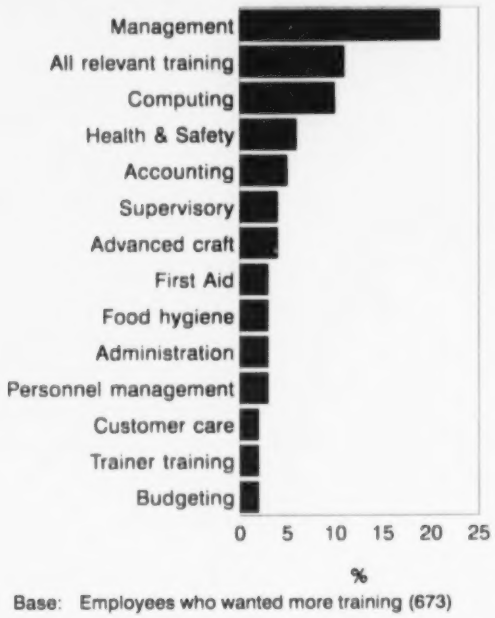
Under a quarter (21%) of employees said they needed management training, 11% wanted all relevant training, 10% computing, 6% health and safety, 4% advanced craft and supervisory.

Employees at supervisory levels (8%) were more likely to want management training than their middle management (4%) senior management (2%) and advanced craft counterparts (2%).

Operative staff (2%) were more likely to need health and safety training for their future development than craft, supervisory and middle management at 1% respectively.

Other training mentioned included, housekeeping, bar skills, receptionist course, menu planning, vending practices stock control and others.

Figure 4.6
Training wanted by employees for their future development



Base: Employees who wanted more training (673)

The majority of managers (58%) acknowledged that they required more training to increase business success. Just over a half of these managers indicated the types of training they needed which, for example, included: marketing, information technology, staff management, business management, professional qualifications and advanced hygiene.

Those employers who had not provided training in the last twelve months felt that their existing employees needed training in customer care techniques and food and drink service. It was their bar and waiting staff who they felt were most in need of training.

The majority of employers who provided training in the last twelve months indicated that they would like to offer additional training to their staff. Table 4.1 is an illustration of the types of additional training employers would like to offer their staff.

Table 4.1
Additional training employers who trained would like to offer staff

Types of training	% employers
Customer care	21
Food hygiene	16
Health & safety	12
Management training	12
Supervisory training	5
Food Prep. & cooking	7
Food & drink service	7

Base: All employers providing training (319)

Summary

- Almost half of employers who had recruited staff in the previous year had experienced recruitment difficulties, which they indicated were primarily linked to skill shortages. As expected, it was those who insisted on recruiting staff with necessary skills and experience (larger employers and those in catering services and contract catering sectors) who most often reported recruitment difficulties. Skill shortages were most frequently reported for catering assistants, chefs and cooks and bar staff.
- Amongst existing staff the majority of employers felt staff were adequately skilled although larger employers, hotels, hospitals and contract caterers reported lower levels of satisfaction. The main skills thought to be lacking were

customer care, basic cookery, health and safety, supervisory and waiting skills. Those employers who had not provided training in the past year most wanted staff to be trained in customer care and food and drink service.

- Employees most frequently wanted training in skills of management, computing, health and safety, advanced craft and supervision.

Supply of education and training

This section summarises the supply of vocational education and training. It investigates sources of training, types of training, level of provision and issues affecting the current and future supply of training to the industry. This section draws upon HCTC's national survey of all colleges and universities providing catering and hospitality programmes in the UK to which 161 colleges and universities (52%) responded, focus interviews carried out with 37 industry training providers and trainers, focus interviews with four TECs/LECs and a postal survey of all TECs/LECs (which resulted in 45 responses).

College provision

Over 300 universities and colleges throughout the UK provide programmes leading to qualifications in hospitality and catering. The last twenty years has seen enormous growth in the provision of higher education degree and postgraduate programmes in hospitality management and in the related areas of tourism and leisure. This growth will now be curtailed as a direct result of a recent cap on higher education EC student intake until 1997.

In recent years, the further education sector has seen a radical shake-up both in terms of provision (with the introduction of NVQs/SVQs replacing many of the traditional craft based programmes, such as City and Guilds 706-1 and 706-2), in the way they are run (with incorporation).

The more recent introduction of General National Vocational Qualifications (GNVQs) in hospitality and catering and GSVQs in Scotland, provided a broad-based vocational qualification route for progression into industry, or further and higher education.

The availability of these qualifications in schools (in addition to colleges who have traditionally undertaken vocational education) has led to concerns over quality. Specifically, there have been concerns as to whether schools have the practical and teaching resources required for such programmes. On the other hand, provision in schools has been welcomed as a means of promoting careers in the industry at an early age and developing the skills base of the industry for the future.

There is no doubt that the initial introduction of NVQs/SVQs led to some consternation in the further education sector. There were real concerns that the introduction of essentially work-based qualifications, threatened the viability of the colleges who offered the traditional craft qualifications.

The wide introduction of Realistic Work Environments (RWEs) has however enabled many colleges to embrace the NVQ/SVQ system and provide a supply of skilled and qualified people relevant to the needs of industry. However, healthy debate on the value and effectiveness of the NVQ/SVQ system continues.

This survey of colleges and universities offering catering and hospitality programmes sought to determine how college course provision is changing and to identify the major influences on course provision.

Influences on course provision

In this study, the heads of catering and hospitality departments of universities and colleges were asked to identify the major influences on current and future college course provision. Their responses are summarised in Table 5.1.

Table 5.1
Factors determining provision of courses

	Current	Future
Sample	**161**	**161**
Demand for courses	52%	37%
Cost of courses/funding	33%	54%
Needs for industry	14%	12%
Facilities available	13%	12%
Physical and human resources	12%	5%
Quality of provision	8%	8%
NVQ Standards	-	6%
Government policy	2%	2%
Provision of RWE's	2%	2%
Employers support	2%	2%
Image of the industry	1%	5%
Demographic changes	2%	-

Demand for programmes from students was the main influence on colleges at the time of the survey (mentioned by 52% of colleges), although the key influence on future provision was said to be funding (mentioned by 54%), followed by student demand for places (37%). Meeting industry needs was a poor third (12%).

In terms of industry demand for appropriately skilled individuals this presents a problem. It cannot be stressed enough how incredibly important it is to attract increasing numbers of students to take up catering and hospitality programmes in colleges and universities if they are to make a valid contribution to the industry's skill needs. Industry needs ought to be the ***major*** influence on college course provision. The Government's 1994 white paper[10] recognised this and stated that they would act to secure 'closer co-operation

10. 'Competitiveness - Helping Business Win', HMSO, May 1994, pg 46.

between the FEFC, colleges and TECs at national, regional and local level'.

The Further Education Funding Council (FEFC) confirmed their support of this initiative in their 1994 Annual Report: *'The Council's new, national funding framework and its relationship with colleges are designed to encourage responsiveness. Each college is encouraged to plan and provide education in ways which meet the needs of students and employers in its area'.*

In addition, the Government promised to establish a 'Competitiveness Fund' administered by TECs to 'help colleges meet particularly critical local labour market needs'.

It appears that these initiatives have not yet had the full impact expected within the field of catering and hospitality. While the HCTC and its partners successfully negotiated with the FEFC to increase the rate of funding for catering programmes to 1.6 (which was more recently increased to 1.7), many colleges still consider the funding to be insufficient to meet the expensive requirements of providing catering programmes including:

- realistic work environments (RWE);
- high staff student ratios;
- high cost of consumables;
- labour intensity;
- requirements for expensive and up-to-date equipment.

College provision of catering programmes

Table 5.2 shows the estimated total provision of catering and hospitality places and the total applications for places for the academic year 1994/95 (figures have been grossed up from the 161 respondent colleges, on the basis of secondary research on the known provision for non-respondent colleges).

It can be seen that higher education programmes generally receive more applications than places, while many further education programmes were under-subscribed.

Degree applications are, however, governed by the Universities and Colleges Admission Service (UCAS), which permits each applicant to apply for up to 8 places. Therefore, an apparent oversubscription is likely to be overstated.

Applications at NVQ/SVQ levels one and two only just matched available places. However, applications were received for only 40% of available places leading to NVQ/SVQ level three.

Not surprisingly, 90% of NVQ/SVQ places were offered for food preparation and cooking (51%) and food and drink service (39%). This continues a tradition whereby food preparation and cooking programmes dominate colleges' catering and hospitality provision.

While this does to some extent mirror the skill requirements of the catering and hospitality, it does not reflect the proportions of the workforce employed in these areas, with more positions in food and drink service. More likely, it reflects the fact that RWEs in colleges lend themselves more readily to food preparation and cooking and food and drink service, than to housekeeping, reception and portering. Of the 161 colleges who responded to the HCTC survey, the majority (88%) had at least one RWE. Table 5.3 shows the actual range of RWEs offered by respondent colleges.

Table 5.2

Places available and applications made 1994/95 College-based catering and hospitality programmes

	Applications	%	Places	%	Applicants to places
Degree	15,249	58.0	3,136	25.4	4.9
BTEC	3,419	13.0	1,921	15.6	1.8
HND	3,040	11.6	1,506	12.2	2.0
GNVQ Level 3	2,356	9.0	2,288	18.5	1.0
GNVQ Level 2	2,217	8.4	3,487	28.3	0.6
Total non-NVQ	26,281	100.0	12,338	100.0	2.1
NVQ/SVQ - Level 1					
Food Preparation & Cooking	2,553	61.1	2,360	56.1	1.1
Food & Drink Service	1,255	30.0	1,338	31.8	0.9
Housekeeping	171	4.1	332	7.9	0.5
Reception & Portering	202	4.8	174	4.1	1.2
Guest Service	0	0.0	0	0.0	0.0
Total Level 1	4,180	100.0	4,204	100.0	1.0
NVQ/SVQ - Level 2					
Food Preparation & Cooking	6,128	53.8	6,379	54.9	1.0
Food & Drink Service	4,496	39.5	4,448	38.3	1.0
Reception	588	5.2	593	5.1	1.0
General	179	1.6	204	1.8	0.9
Total Level 2	11,391	100.0	11,623	100.0	1.0
NVQ/SVQ - Level 3					
Food Preparation & Cooking	1,080	41.8	2,891	42.7	0.4
Food & Drink Service	308	11.9	2,927	43.2	0.1
Reception	18	0.7	15	0.2	1.2
Housekeeping	12	0.5	14	0.2	0.9
Kitchen & Larder	544	21.1	455	6.7	1.2
Patisserie & Confectionery	553	21.4	425	6.3	1.3
OLPS	70	2.7	47	0.7	1.5
Total Level 3	2,585	100.0	6,774	100.0	0.4
NVQ/SVQ - Level 4					
Food Preparation & Cooking	4	27.2	4	48.0	1.0
Food & Drink Service	9	57.8	2	25.5	4.0
Reception	2	15.0	2	26.5	1.0
Housekeeping	0	0.0	0	0.0	0.0
OLPS	0	0.0	0	0.0	0.0
Total Level 4	16	100.0	9	100.0	1.8
Total Levels 1-4	18,172		22,610		0.8
OTHER	3,538		3,401		1.0
Total	47,991		38,349		1.3

Note: The numbers of places available and the numbers of applicants have been grossed up from the survey sample on the basis of the programmes offered by the colleges which failed to return the questionnaire.

Table 5.3
Realistic working environment offered by respondent colleges

	% of colleges offering	No. of colleges offering	Total RWEs*
Sample			
Restaurant	70%	113	178
Central production kitchen	19%	31	47
Cafe/Coffee shop	18%	29	35
Bar	16%	26	30
Kitchen	14%	23	45
Student refectory	14%	23	30
Bakery	12%	19	21
Patisserie	10%	16	16
Larder	7%	11	14
Fast Food outlet	7%	11	16
Conference facility	6%	10	10
Banqueting room	1%	2	2
Vending facility	1%	2	2
Outdoor functions	1%	2	2

* Some colleges have several RWEs

Over two-thirds of colleges (68%) reported that they had problems attracting sufficient numbers of students, while 21% reported that programmes were oversubscribed (of which degree programmes were most frequently mentioned).

An enormous variety of reasons were given for the problems of attracting sufficient numbers of students, for example, competition from other providers, lack of interest in the industry (both mentioned by 17%) and lack of financial assistance to students (13%), were the most frequently mentioned.

Current HCTC employment forecasts[11] indicate that predicted college output will not meet industry skill requirements into the next decade.

Government Training Schemes

Youth Training and Training for Work

The hospitality industry is a growth industry, offering a range of employment opportunities for school leavers and unemployed workers displaced from other industries. Youth Training (YT) and Training for Work (TfW) schemes provide a valuable source of new recruits to the industry, providing both the young and the unemployed with the essential skills needed by the industry.

Almost a quarter of industry employers (23%) surveyed by the HCTC in 1994/95 said that they used Youth Trainees, while 20% used adults on Training for Work Schemes. Use of trainees was highest in larger establishments although 17% of employers with up to 10 staff employed Youth Trainees and 14% Trainees for Work. One third (32%) stated that their main motive for employing trainees was 'to give them a chance', although over 20% said it 'provided trainees with experience' 16% that it 'provided extra staff' and 12% that it was to 'the long-term benefit of the industry'.

Youth Training and Training for Work Schemes are administered by TECs and LECs on a local basis. In the main, local training providers contract with the TECs/ LECs to provide training and industry placements for trainees, although some

11. Employment Forecasts Update 1995, HCTC (to be published Autumn 1995).

Supply of education and training

TECs/LECs contract directly with employers. All YT and TfW trainees work towards NVQs/SVQs usually at level 2, though trainee-ships are also offered at levels 1 and 3 in some areas.

This study's survey of TECs/LECs revealed a variety of different schemes in operation for the provision of YT and TfW. The schemes varied considerably on the levels of NVQs/SVQs to be achieved, the timescales for achieving a job or a qualification and the qualifying criteria for trainees.

A few TECs/LECs provided funding for NVQ/SVQ level 1, while others refused to fund a level 1 qualification, saying that it had little or no value. This despite the fact that for the hospitality industry a high proportion of jobs are at operative level, where a level 1 vocational qualification is often most appropriate.

One TEC indicated that it was reluctant to fund NVQs at level 2, wanting to be able to fund level 3 or 4 qualifications to secure a higher level of skills and competences in the local labour market, while other TECs/LECs were prepared to fund trainees outside of the government guarantee groups.

All TECs/LECs are working towards schemes for starts and outputs funding, with 80% of those responding to the survey indicating that they already had schemes in place. Starts and outputs funding requires the achievement of a 'successful outcome' (a qualification, or a job) before the training provider receives the bulk of funding for the training services provided. Payments are made for trainees started on a TfW scheme followed by the payment of the bulk of the fees on the trainee achieving a qualification or a job. Although schemes may vary by TEC/LEC region, the largest payment is generally available if the positive outcome is a job rather than a qualification.

All training providers interviewed by the HCTC expected the new scheme to create further difficulties in relation to cash flow. The government's intention for introducing such a scheme (and working towards 100% output related funding) was to ensure training providers were providing value for money.

Training providers, however, reported that in some areas the scheme endangered their viability in that they might place considerable resources into training and placing trainees only to find at the end of the day, through no fault of their own, that the trainees failed to achieve either a job or a qualification and that they did not therefore receive any payment. Training providers indicated that this had a number of effects on them:

- they would lose money and thus would be forced to make trainers redundant and reduce the service they provided for government funded training schemes, while looking for alternative sources of funding;
- they might be more selective in recruiting trainees, recruiting only those most likely to achieve a job or a qualification thus ignoring those in most need of re-training and ignoring equal opportunities;
- they might be tempted to cheat, to pass trainees for a qualification, although the trainee might not be ready, thus devaluing the qualification; and
- they considered they were becoming more a job agency rather than training providers, eager to place a person in a job to secure funding rather than provide expensive training at the risk of not achieving funding.

There are, therefore, clear signals from training providers that although the system might be effective in terms of controlling expenditure, it has a number of serious adverse affects on training providers which need to be reviewed.

TECs/LECs have also sought to cap funding to control expenditure. This means that the payment for the number of successful outcomes that can be achieved is limited. Since TECs/LECs are cash-limited, they generally have no choice but to limit their liability. The training provider, however, has to build in a contingency for potential drop-outs from the trainee scheme and would have no incentive to provide further training once their quota was achieved, with knock on effects in terms of the skills supply to the industry. The majority (86%) of TECs/LECs responding to the HCTC survey indicated that they capped positive outcomes.

Another difficulty mentioned by the majority of training providers was the application of time limits by TECs/LECs for the achievement of NVQs/SVQs under the YT and TfW schemes. It was the original intention that NVQs/SVQs would not be time-served. However, some TECs/LECs are now imposing very tight limitations for the achievement of the positive outcome.

The government via the (then) Employment Department imposed age limits for funding for the achievement of qualifications, linked to their eligibility criteria for the schemes. Some TECs/LECs used these age limits to prescribe the time by which a 'positive outcome' had to be achieved for the training provider to receive payment. Others, however, set much stricter limits (e.g. in one case YT trainees were required to achieve an NVQ level 2 qualification in 12-18 months, while in another case TfW trainees were required to achieve an NVQ level 2 qualification in 6 months). There is also a very real danger that the same problems might emerge in the provision of the new Modern Apprenticeships.

National and regional training providers also reported difficulties in meeting local TEC/LEC claims for payment, with different TECs/LECs requiring different types of information, at different levels of detail and in differing formats. A number of TEC/LECs, for example, required computer claims to be provided on a particular software package, which providers were finding problematic as different TEC/LECs purchased and adopted different systems.

Training Providers

Focus interviews were undertaken with 37 training providers. Respondents could be divided into two key groups, those providers who were involved with government schemes and those providing training on a commercial or consultancy basis outside of Government schemes.

Youth Training/Training for Work

Thirteen providers were involved in Youth Training (YT) and nine were involved in Training for Work (TfW). All training providers working with the unemployed were involved in NVQs/SVQs due to TEC/LEC requirements.

In fact, all were involved in training leading to food preparation and cooking NVQs/SVQs at levels 1 and/or 2. Only one training provider was offering training leading to a reception NVQ. As with colleges, there was little provision of training leading to NVQs/SVQs in the areas of housekeeping, reception and portering.

Roughly half of these training providers had Realistic Work Environments for their trainees, the others put trainees straight into work placements. According to training providers, the major benefit of an RWE was that it allowed trainees to be 'broken in gently' (despite the fact that this was not what RWE was for). It enabled staff to get an insight to the hospitality industry before being thrown in at the deep end. Those training providers without RWEs, however, argued that being sent straight out into industry was far more realistic.

Measuring the effectiveness of training was not considered a primary concern by training providers, particularly those involved with Training for Work and Youth Training. Effectiveness tended to be measured in terms of whether the quota of NVQ/SVQ passes or job outcomes was reached.

Special Needs

Three Training Providers dealt solely with Special Needs trainees who were categorised by the careers service in the following way:

Category A = unlikely to achieve a qualification

Category B = may achieve NVQ level 1 with help

Category C = will achieve level 2 with help and support

Most training providers interviewed dealt with a proportion of YT/TfW trainees who could be classified as Special Needs - a high proportion of them tended to be attracted to catering. Special Needs were defined as:

- illiteracy;
- English as a second language;
- motivational problems;
- family and other social problems etc.

Training providers suggested that provision for special needs candidates was at risk under TEC/LEC future funding arrangements.

Commercial

The main customers of the commercial companies tended to be medium sized companies and national chains. Sectors frequently mentioned were hospitals, contract caterers, the licensed retail sector and hotels.

There was a vast range of programmes offered ranging from health and safety and food hygiene to trainer training, management development and ad-hoc consultancy work. Courses tended to be off the job and to last between 1 and 3 days. Commercial training providers rarely catered for smaller employers and training programmes were only slowly being related to the requirements of the NVQ/SVQ framework.

Training providers admitted that they did not undertake enough post-course evaluation of their training, in the main only distributing a course appraisal form at the end of short courses. Only if feedback was very negative would it be followed up.

Future for Training Providers

YT and TfW Providers

All YT and TfW providers considered that there was a demand for their programmes: catering being identified as one of the more popular programmes. Only two training providers described demand for catering training as growing, others considered it to be steady. National trends were thought to be leading to a higher demand for YT courses but lower demand for TfW.

Uncertainty was the overriding feeling expressed by those involved with YT and TfW schemes. Training providers were concerned about the viability of their own businesses (the future of TEC/LEC funding) and about the future of the TfW scheme, which some thought was at risk. They generally believed that the future would be challenging, but that they needed to diversify into new markets and be more proactive and innovative in identifying training needs of the industry. These providers indicated that they would like:

- more support from TECs/LECs/NCVQ/SCOTVEC/EHOs/ITO/Lead body in terms of marketing, advice on the delivery of training and NVQs/SVQs, and provision of support materials;
- more opportunities for training providers to work together;
- a higher profile being given to YT as an option for young people.

Commercial training providers

A growing demand for training programmes was identified with training and development perceived to be more critical to a company's success than ever before. They identified that the future was likely to be more competitive and that they would have to be more proactive in developing new business, for example by following trends towards:

- more tailor-made courses for businesses with less emphasis on standardised courses;
- increased demand for ongoing training/development and for a wider range of programmes;
- less demand for trainer-training programmes which were also becoming a bit outdated; and
- increased demand for external trainers to appraise training courses run by large companies.

Future influences on industry training provision

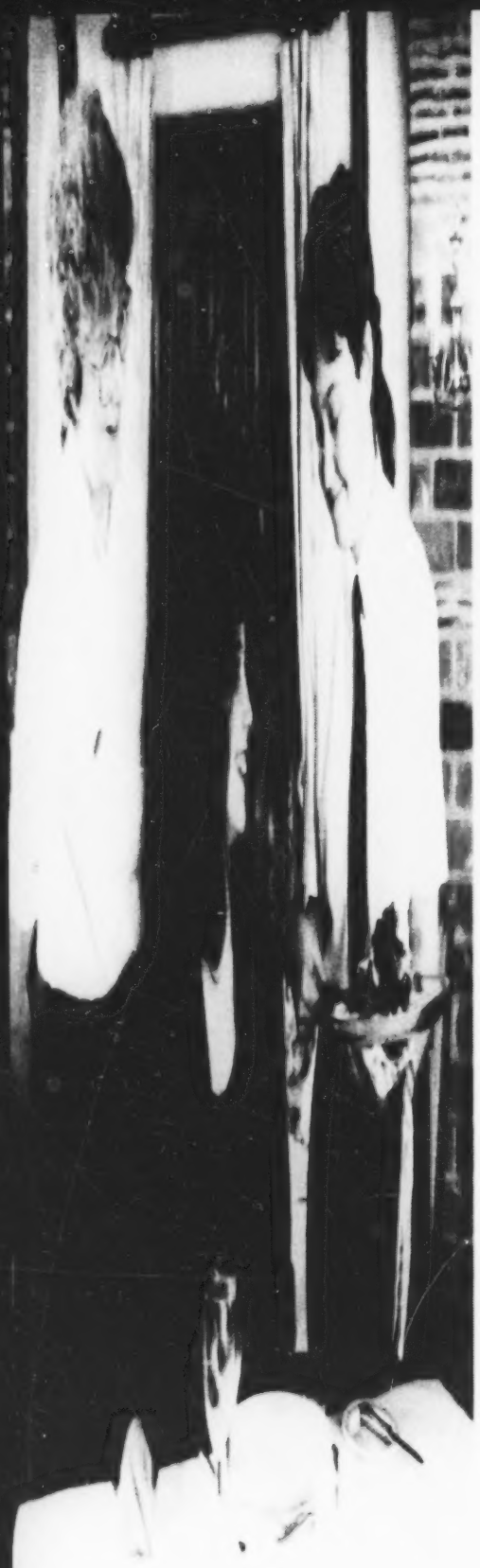
Asked about the likely future influences on training in the industry, training providers identified the potential for NVQs/SVQs, but with reduced bureaucracy and more effective marketing to the industry. Investors in People (IiP) was also considered to be a positive initiative which motivated staff and improved the reputation of the business. Some providers were uncertain as to whether the existing set-up of TECs/LECs would remain.

Summary

- College provision of catering and hospitality programmes was largely being determined by funding considerations and demand from students, rather than industry needs.
- Higher education courses generally attracted more applicants than places while NVQ/SVQ courses in further education were generally under-subscribed, particularly at levels three

and four, with colleges reporting the main reasons for this being competition from training providers, other colleges and schools; lack of interest in the industry; and lack of financial assistance to students.

- Colleges were largely geared towards the provision of food preparation and cooking and food and drink service programmes, with little provision in accommodation service areas, such as housekeeping, reception and portering. Training providers were also most frequently providing Youth Training (YT) and Training for Work (TfW) trainees in food preparation and cooking.
- Youth Training (YT) and Training for Work (TfW) schemes were popular with the industry, but the funding arrangements imposed by the TECs/LECs were creating enormous cash-flow difficulties for training providers. Arrangements for payment upon the achievement of 'positive outcomes' (jobs or qualifications) within limited timescales were endangering the purpose of the scheme and threatening the quality of training services provided.
- Providers wanted to see greater promotion of NVQs/SVQs and Investors in People (IiP) by all industry bodies to stimulate industry implementation.
- Commercial training providers identified the need to provide more flexible, tailored programmes to meet industry needs. They identified growing demand for courses, but increased competition for business.



Influences on training provision

This section examines the major influences on training provision in the industry, while the attitude of employers to training remains an overriding factor; this section concentrates on examining government policy, training initiatives and the impact of the Industry Training Organisation (ITO) and Lead Body.

Government Policy

Government policy towards training and qualifications has been to establish mechanisms to support training activity at both a national and local level, while emphasising employers' and employees' own responsibility for their training and development activity.

The government has continued to provide direct financial support for the training and development of school leavers, the long term unemployed and those disadvantaged in some way.

The government removed obligations on employers to train or contribute to industry training initiatives as administered by the Industry Training Boards. In response to industry calls, the government abolished the training levy imposed on employers and sought the earliest possible transfer of Industry Training Boards into the private sector. In place of the statutory Industry Training Boards the Government established non-statutory Industry Training Organisations (ITOs often the former ITBs), as the bodies responsible for representing industry views on training issues.

It was the intention of the Government that the ITOs would be established to represent a wider range of industries and thus provide representation of a higher proportion of the total workforce than had been provided by the ITBs. In particular the government gave ITOs the responsibility to oversee the development of occupational standards in each industry

(recognising many of them as Lead Bodies) and identifying and monitoring industry skill and training needs.

The government established the National Council for Vocational Qualifications (NCVQ) to establish the NVQ framework and for ensuring quality in the qualifications accredited within it; in Scotland this responsibility rests with the Scottish Vocational Education Council (SCOTVEC).

It also established Training and Enterprise Councils (TECs) in England and Wales and Local Enterprise Companies (LECs) in Scotland to oversee the implementation of local training and enterprise. The TECs/LECs took over from central government the training support schemes for the unemployed and were encouraged to galvanise employers in their local area into more effective commitment towards improving training performance.

Apart from assisting young people in the transition from school to work and assisting the long term unemployed and others disadvantaged from entering employment, the government placed responsibility for paying for training firmly in the hands of employers and employees themselves. A responsibility that a significant amount of employers in the industry have failed to grasp.

The Government has offered tax incentives and Career Development Loans (at preferential rates) to individuals prepared to fund their own training and development. Small Firm Training Loans have been offered to employers with up to 50 staff, to help fund training activity.

The launch of the NVQ/SVQ framework, the Investors in People initiative, National Education and Training Targets and National Training Awards have been aimed at encouraging employers to take responsibility for developing appropriate work-based training leading to nationally recognised vocational qualifications.

New initiatives such as the framework for Modern Apprenticeships are intended to further enhance skill levels in industry through work based training initiatives.

It is not the place of this report to enter into discussion on the political merits of Government policy, so the following reflects only the clearly stated views of employers, training providers and TECs/LECs on those policies.

Employer Awareness of Government Initiatives

The initiatives designed to influence employers into developing work-based training initiatives can only be effective if they are understood by employers. Employers' awareness of the initiatives were explored in the HCTC survey of 562 industry employers.

Over half (54%) of respondent employers were aware of TECs/LECs, though awareness levels were lower (44%) amongst the smallest employers (employing 1-10 staff) and higher (78%) amongst larger employers (25+ staff). The restaurant sector had the lowest levels of awareness of TECs/LECs.

Just 26% of respondents were aware of Investors in People, where awareness ranged from only 12% amongst the smallest employers to 56% for the larger employers.

Awareness levels were particularly low amongst restaurants (just 7% aware of IiP), clubs (19%) and the sector (20%).

The majority of employers (69%) were aware of NVQs/SVQs. As with other initiatives however, awareness was higher in larger establishments (91% awareness in 25+ staff employers and 76% in 11-24 staff employers) compared to smaller establishments (56% awareness where up to 10 staff were employed). Again, knowledge of the system was lowest in restaurants (42%), clubs (56%) and pubs (66%). Within contract, hospital and school catering there was over 90% awareness of NVQs/SVQs.

Only 16% of employers had heard of Small Firm Training Loans which are available to employers with up to 50 staff. Even here, awareness of the scheme was higher amongst the larger catering and hospitality employers.

Although only recently developed, just under 10% of respondent employers were aware of Modern Apprenticeships at the time of the survey (October 1994-February 1995), with one-third of those aware of the scheme already interested in participating in it.

Clearly, awareness of some government initiatives needs to be improved. It is commonly stated that most initiatives are best suited to larger employers and these appear to have been most effectively targeted to date.

The majority of industry employers are however small (87% employ just 1-10 staff), do not have a training culture and are arguably most in need of advice. It is suggested that small employers do not participate in training initiatives because they have no interest in them but, if the majority of them are not even aware of the initiatives designed to help employers, it is not surprising that they also do not participate in them.

Perhaps the biggest failing identified for all partners, including government, TECs/LECs, ITO, etc., concerned with the implementation of vocational training in the industry, is their failure to get messages across to the majority of small employers.

Training Providers' views on Government initiatives

Training providers were not directly questioned about government policy, but were asked about the effects of the NVQ/SVQ system, YT and TfW schemes on them and the general influences on the supply of training.

Training providers were very supportive of the NVQ/SVQ framework and both trainers and trainees were said to be very positive about them. There were concerns about the levels of bureaucracy, whether NVQs/SVQs were the 'right vehicle' for YT and TfW and frustration at the lack of awareness of NVQs/SVQs in the industry. However, as mentioned earlier in this report, the major concerns about NVQs/SVQs related to the problems caused by TEC/LEC funding systems for YT and TfW which were heavily criticised by training providers.

It was apparent that training providers who were reliant on funding from the TECs/LECs were losing confidence in them, which must be a cause for concern. They indicated that TECs/LECs were reducing funding each year and that providers were effectively being put out of business. However, TECs/LECs themselves are under increasing financial constraints (see later).

The providers expressed grave concerns about the current and proposed systems of payment and timescales set for funding YT and TfW. Training providers were concerned that there was no longer any room for discussion with TECs/LECs, but rather that they were required to play by TEC/LEC rules as they held the purse strings.

Training providers considered IiP to be a very positive initiative. They believed it motivated staff and improved the reputation of the business adopting the standard. They recognised it as an initiative applicable to all staff which could be implemented more quickly than NVQs/SVQs.

Views of TECs/LECs on the impact of Government initiatives locally

TECs/LECs considered that their policies were having a local impact on improving skills and training levels. Of the 45 TECs/LECs that responded to the HCTC self-completion survey, a third placed a 'high priority' on support for hotel and catering, while just over half gave it 'medium priority'. There were expressions of regret by some TECs/LECs at the reduced levels of funding which they were required to pass onto training providers.

Awareness and understanding of the roles of the HCTC

The Hotel and Catering Training Company (HCTC) was formed in 1989 and is the successor body to the statutory Industry Training Board (HCITB), itself established in 1966.

The company's assets were inherited from the Board and are the responsibility of a Board of Trustees nominated by the industry's principal trade associations the British Hospitality Association (BHA), Brewers and Licensed Retailers Association (BLRA) and Restaurateurs Association of Great Britain (RAGB). The interest on the reserves of the Hotel and Catering Training Company (HCTC) held by the Trustees were assigned to fund continuing core work activities previously undertaken by the Board, including setting occupational standards, monitoring industry employment and training needs, and career development. The Government was keen to maintain an industry voice on training issues and therefore recognised the HCTC as the Industry Training Organisation (ITO) and Lead Body. The Company, has four main roles:

- Industry Training Organisation (ITO): taking the lead in industry training and associated research initiatives and careers promotion;
- Lead Body responsible for the development of occupational standards (NVQs/SVQs) for this industry;
- Awarding Body to approve organisations to offer NVQs/SVQs;
- Commercial Training Provider to the industry offering YT/TfW programmes and a range of training courses, consultancy and support.

The HCTC is a non-profit making resource for all sectors of the Hospitality industry and is registered as a charity. Its ITO, lead body and Awarding Body activities are overseen by three influential consultative committees.

As the representative body for the industry on training issues it is important that the industry is aware of the roles of the HCTC.

Employers were asked if they were aware of the roles of the HCTC and whether they understood what these activities entailed.

Table 6.1
Awareness of the roles of the HCTC by size of establishment

	1-10 staff	11-24 staff	25+ staff	Total
Sample	**222**	**127**	**113**	**462**
HCTC as training provider				
Yes	42.3%	60.6%	65.5%	53.0%
No	57.7%	39.4%	34.5%	47.0%
HCTC as YT/AT provider				
Yes	32.4%	46.5%	56.6%	42.2%
No	67.6%	53.5%	43.4%	57.8%
HCTC as ITO				
Yes	31.1%	53.5%	62.8%	45.0%
No	68.9%	46.5%	37.2%	55.0%
HCTC as Awarding Body				
Yes	32.4%	48.0%	58.4%	43.1%
No	67.6%	52.0%	41.6%	56.9%
HCTC as lead body				
Yes	22.5%	40.5%	46.0%	33.2%
No	77.5%	59.5%	54.0%	66.8%

Table 6.1 shows the awareness levels of each HCTC activity, while Table 6.2 shows the levels of understanding of what these activities involve.

While just over a half (53%) of employers were aware that the HCTC is a training provider, a lesser proportion (42%) were aware that the HCTC is also a youth and adult training provider. Just under a half of respondent employers were aware that the HCTC is the ITO and an awarding body (45% and 43% respectively). However, just one-third of employers were aware that the HCTC is the industry lead body.

Table 6.2
Awareness of what the activities of the HCTC involves

	Total
Sample	**247**
HCTC as training provider	
Yes	50.6%
Some idea	32.1%
No	17.3%
Sample	197
HCTC as YT/AT provider	
Yes	47.7%
Some idea	35.2%
No	17.1%
Sample	201
HCTC as awarding body	
Yes	54.5%
Some idea	28.3%
No	17.2%
Sample	210
HCTC as ITO	
Yes	56.3%
Some idea	26.2%
No	17.5%
Sample	155
HCTC as Lead Body	
Yes	53.9%
Some idea	28.9%
No	17.1%

Awareness levels of the roles of the HCTC increased with the size of the employer by numbers of staff employed, with the smallest employers least aware of the roles of the HCTC. As was the case with most training initiatives awareness of the roles of the HCTC was lowest amongst employers in the restaurant sector followed by clubs and the licensed retail sector. Awareness levels were highest amongst contract catering employers.

Influences on training provision

Interestingly and without exception over 80% of employers who were aware of the roles of the HCTC also understood what these activities involved.

Since the majority of employers are unaware of the roles of the HCTC, the HCTC needs to promote itself more effectively, so that it may be seen as the industry's voice on training issues. The Government, TECs/LECs and others could aid this process by raising general awareness and status of the roles of ITOs and lead bodies generally.

Summary

- Employer awareness of training initiatives was generally low with lowest levels of awareness amongst small industry employers. There has been a general failing on the part of all industry bodies, TECs/LECs and government to get messages on training across to at least the majority of small employers.
- Training providers involved in YT and TfW provision were losing confidence in the TECs/LECs and government policies influencing administration of the schemes. Funding issues were the principle cause of concern.
- Awareness of the roles of the HCTC was generally quite low, particularly amongst smaller employers, with few aware of the activities of the HCTC in respect of all its roles.

Conclusions

On the face of it, the results of this report are encouraging in that 57% of employers had been involved in training in the last twelve months. The picture is most encouraging in the catering services sectors and the larger organisations. It is encouraging also that 84% of those involved with the delivery of training saw tangible benefits as a result. These included, improved quality, increased profit levels, employees having greater pride in their work and greater customer satisfaction. Employees too, were enthusiastic about the benefits of training, it enabled them to do their job better - especially where they were given the opportunity to achieve qualifications. However, as this report shows, more detailed analysis of the data presents a less than rosy picture.

A significant proportion, over 40%, of employers do not train their staff. This applies particularly to small employers and those in the restaurant, pubs and clubs sector. In these establishments, a training culture just does not exist, neither is there an acceptance on the part of employers to take responsibility for training and developing their staff.

Even in those organisations who had carried out training, only a quarter had trained all of their staff, with contract caterers and in-house caterers the most likely sectors to offer equal opportunity for training.

The hospital catering sector, pubs, restaurants and education catering were least likely to. This perhaps reflects the high levels of part-time staff employed in these sectors. However, it remains a concern that the majority of people working in the industry (ie.. those that work part-time or on a regular but casual basis) are largely ignored when it comes to training.

Conclusions

Considering that these employees account for 65% of the industry's workforce, the industry avoids training them at its peril.

If the training linked to a real or perceived legislative or inspection requirement is removed from the equation, a lamentably low level of training is actually carried out. Less than 40% of those employers involved in training did any skills based training, and then only a quarter trained all of their staff. Only 15% of responding employers had received customer care training and a look at training carried out using external sources reinforces these findings.

While in general, the picture emerging is a depressing one, there are some nuggets of hope. For the quarter of employers who really invest in their staff, all the evidence points only to the good that comes out of a well planned and executed training programme. These businesses emphasise the importance of not only planning and delivering a well thought out training plan for their staff, but also the importance of evaluation. The whole training programme should be part of an on-going business development programme.

Unfortunately, only a minority of the industry are truly benefiting. What is more worrying is that many organisations tended to see any kind of training as a one off fix to solve a short term problem. Whereas, in reality, the training needs issue is far more deep rooted than that.

Turning to smaller employers, training just simply did not seem to be on the agenda. The main reasons being the pressures experienced by small businesses to survive and the excessive amount of time and resources required in order to put training programmes into place. It was also perceived that available training programmes were not geared up to meet the specific requirements of the small business. This is clearly a case where training providers need to be sensitive to this particular market need. They need to be innovative and look to more flexible methods for delivering their training programmes or marketing their training packages. The use of consortia arrangements and partnerships must be explored in much more depth to enable more small employers to get involved and see training as an investment worth making.

While this study has revealed a mis-match between the supply and demand for training, the root of the problem seems to be more fundamental. Employers generally demonstrate a lack of interest or ability to seize upon training initiatives and they certainly do not appear to accept a responsibility to invest in training to improve their business performance.

Undoubtedly, the industry suffers from a severe skills shortage. It consistently reported the highest levels of hard-to-fill vacancies of any industry over the lifetime of the government's Skills Needs in Britain survey. This study confirmed on-going recruitment difficulties (44% of employers participating in the survey had experienced recruitment difficulties over the last year). Employers put these difficulties down to skills shortages, primarily, but also low pay and inconvenient working hours.

At the same time, colleges reported that further education vocational programmes were significantly under-subscribed, and that they were failing to recruit young

people onto programmes. This was partly due to increased competition from other providers of education and training, but also lack of interest in this industry and a lack of financial assistance for the programmes offered. All this suggests that the industry not only has a low skills base, but also has difficulty filling positions with sufficiently skilled people from the labour market.

There were some key messages coming out of the report for suppliers of training and vocational education to the industry. Although most provision in colleges concentrated on food preparation and cooking and food and drink service, more qualified people in these areas are necessary. There is also a huge gap in the provision of housekeeping, Reception and Portering programmes and this urgently needs to be addressed.

Training providers and colleges were clearly contributing significantly to overall industry training and qualification levels. However, funding pressures, commercial realities and existing training and qualification systems were such that many providers were only responding effectively to the needs of larger employers. More flexible and tailored programmes are required to meet the growing needs of industry, particularly in the small business sector.

Those providers who were delivering government training schemes reported that they were facing considerable pressures which were diminishing the volume and quality of the training services they were able to provide. Colleges were also subject to pressures on funding which had therefore become the major influence on programme provision followed by student demand with industry needs a poor third. Training providers and colleges however, could tap into a considerably larger market for vocational education and training if they were able to help employers overcome many of the barriers to training that exist and by the provision of more flexible training and delivery mechanisms geared to industry need.

As far as initiatives to stimulate training were concerned, there had been a general failure across the board to get the NVQ/SVQ message across. There is now a need for all partners involved in the process to address the problems and look to opportunities for the future. There is an urgent need to raise awareness to the benefits of involvement in the NVQ/SVQ system. This needs to be targeted at all staff and at all employers throughout the industry.

If the level of awareness and take-up of NVQs/SVQs was poor, the situation with Investor in People (IiP) was even worse. Only quarter of employers were aware of IiP, and only 3% of the employers interviewed were certified. Restaurants, pubs and clubs were least aware of IiP.

Of greater concern, was that only half of employers had heard of TECs/LECs, and only 18% had any idea of what they did and what they were there for. Only 1% claimed to have used them. This study has some clear messages for TECs/LECs, both from the providers in terms of the quality assurance concerns and cash flow problems, and employers in terms of communicating their roles and objectives.

Conclusions

In sum, the most important conclusions that must emerge from this study are that there is a need to:

- emphasise the benefits of training to all employers in every sector and the bodies which influence them;
- urge employers to take responsibility for training and developing their staff for the benefit of their business;
- rigourously raise awareness and promote the outcomes and benefits of existing training initiatives and support mechanisms;
- ensure that training provision and vocational qualifications are more accessible and relevant to the industry;
- ensure that TECs/LECs are taking notice of this industry's needs and concerns.

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